User Manual – Admin Tool
PHASE 4.0

Pennsylvania Turnpike Commission

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Chapter 1 Introduction

Introduction

This document describes how to use the Admin Tool of the Electronic Bidding System (EBS) developed for the Pennsylvania Turnpike Commission. This user manual is the reference for Admin Tool functions for PTC administrators of EBS.

There are step-by-step instructions and examples of each section of Admin Tool functions as indicated below on the Admin Tool home page.

Chapter 1 – Introduction and Login Information
Chapter 2 – Security
Chapter 3 – Feedback
Chapter 4 – Logs
Chapter 5 – Settings
Chapter 6 – Contractor (Business Partner)
Chapter 7 – Project
Chapter 8 – Standards Library
Chapter 9 – Document Management
Chapter 10 – Items
Chapter 11 – Downloads

Logging into EBS

- Open your web browser by clicking on the Internet Explorer icon on your Windows desktop or through the Start Menu / Programs / Internet Explorer
- Currently Internet Explorer is the only web browser supported and full support is given up to Version 8. If Versions 9 or 10 are used, then XXXXXXXXXX
- Compatibility View Information

- Type the following URL below into the address text box of your web browser: https://ebs.paturnpike.com/
- Alternatively you can bookmark https://ebs.paturnpike.com/

This is the home page for Pennsylvania Turnpike's Electronic Bidding System. From this page you will be able to navigate throughout the site and perform contractor registration functions.

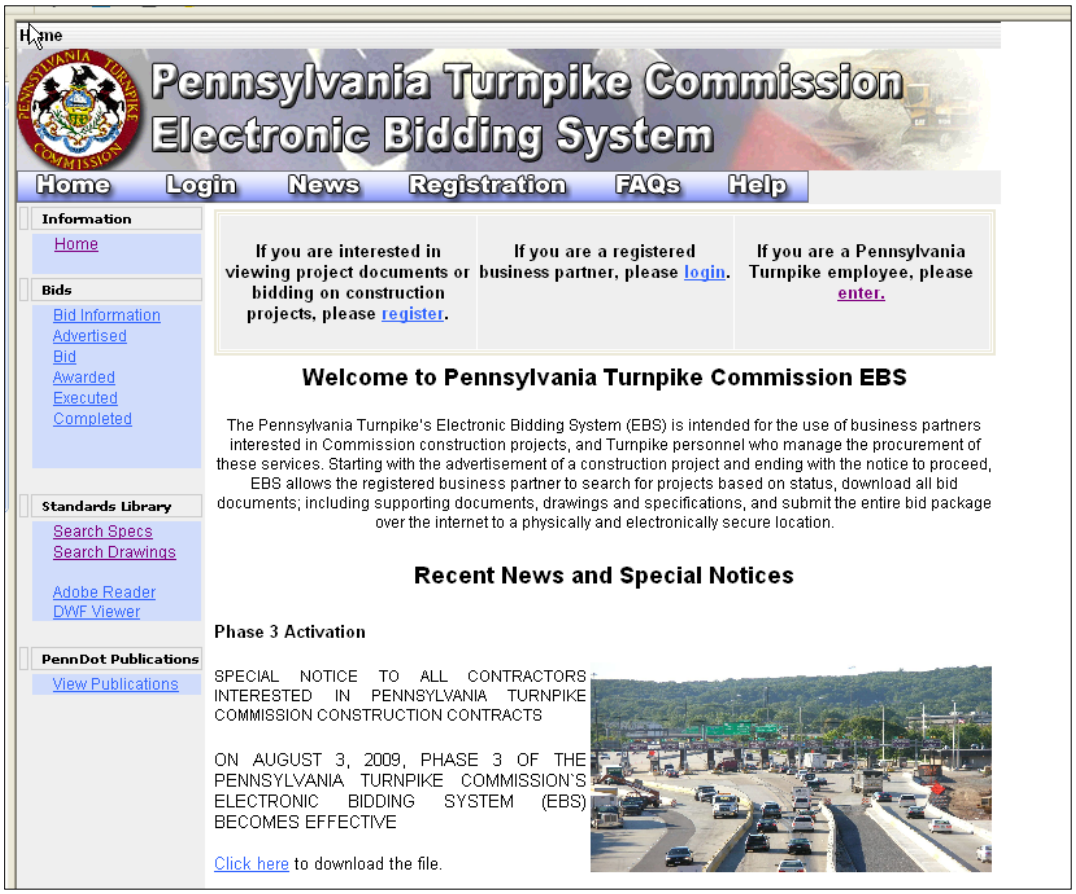

Home
Pennsylvania Turnpike Commission
Electronic Bidding System
Home
Login
News
Registration
FAQs
Help
Information
Home
Bids
Bid Information
Advertised
Bid
Awarded
Executed
Completed
Standards Library
Search Specs
Search Drawings
Adobe Reader
DWF Viewer
PennDot Publications
View Publications
If you are interested in viewing project documents or bidding on construction projects, please register.
If you are a registered business partner, please login.
If you are a Pennsylvania Turnpike employee, please enter.
Welcome to Pennsylvania Turnpike Commission EBS
The Pennsylvania Turnpike's Electronic Bidding System (EBS) is intended for the use of business partners interested in Commission construction projects, and Turnpike personnel who manage the procurement of these services. Starting with the advertisement of a construction project and ending with the notice to proceed, EBS allows the registered business partner to search for projects based on status, download all bid documents; including supporting documents, drawings and specifications, and submit the entire bid package over the internet to a physically and electronically secure location.
Recent News and Special Notices
Phase 3 Activation
SPECIAL NOTICE TO ALL CONTRACTORS INTERESTED IN PENNSYLVANIA TURNPIKE COMMISSION CONSTRUCTION CONTRACTS
ON AUGUST 3, 2009, PHASE 3 OF THE PENNSYLVANIA TURNPIKE COMMISSION'S ELECTRONIC BIDDING SYSTEM (EBS) BECOMES EFFECTIVE
Click here to download the file.

Figure 1 – EBS Home Page

Login (Admin Tool)

Procedure:

- Open Internet Explorer web browser and type the following in the address bar: https://ebs.paturnpike.com - this is the EBS Home Page (Figure 1, above)
- Click on the "enter" hyperlink in the top right corner of the Home page (Figure 5, below)
- Enter your Turnpike employee login information (e.g. username = and password =)
- Click on the Login button
- Scroll down and click on the Admin Tool link under the Security and Settings section in the navigation bar (Figure 6)
- Enter your Turnpike employee login information (e.g. username = and password =) (Figure 7)
- Click on the Login button again
- The Admin Tool home page will display (Figure 8)
- Alternatively, you can login **directly** to the Administrators Tool website – only one login is required when you use the following link or shortcut: https://ebs.paturnpike.com/admintool/

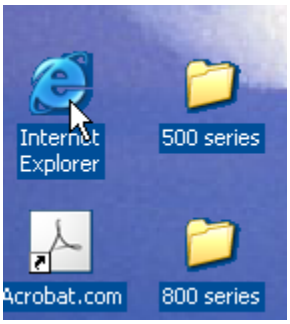


Figure 2 – IE desktop icon

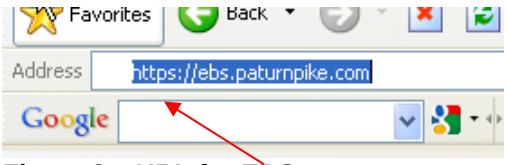


Figure 3 – URL for EBS

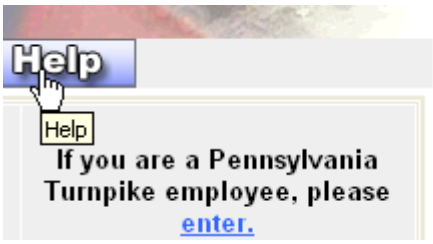


Figure 4 – Enter link

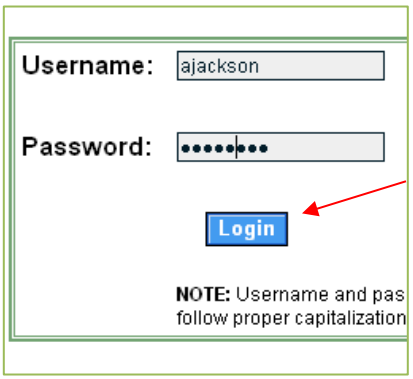


Figure 5 – Login button

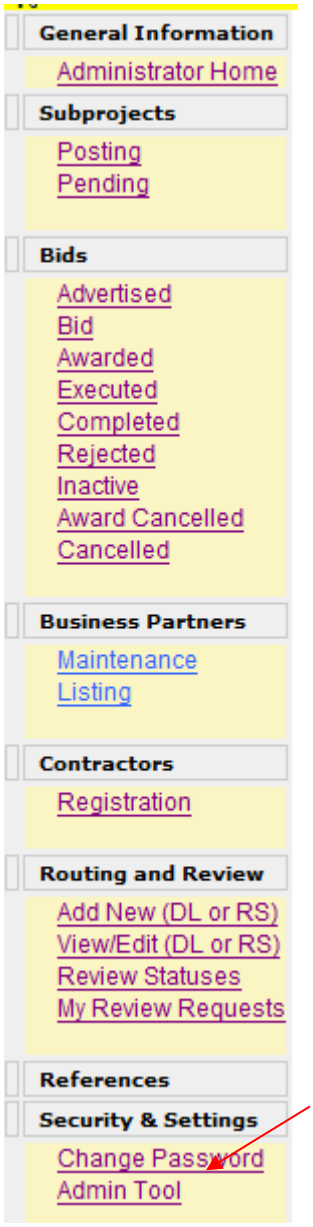


Figure 6 – Admin Tool link on Admin home page

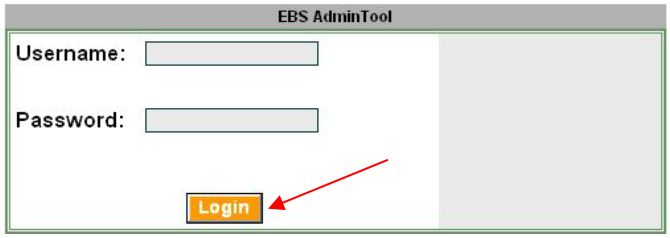


Figure 7 – Login to Admin Tool

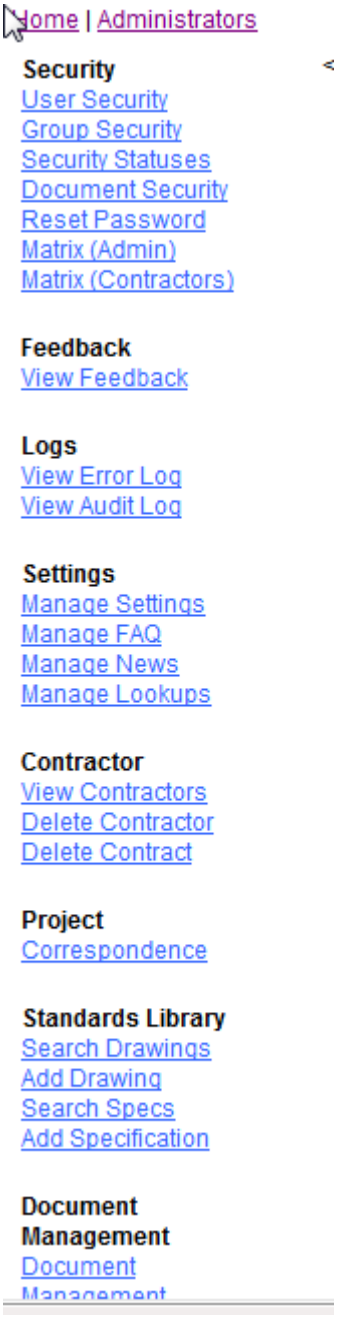


Figure 8 – Admin Tool home page

Chapter 2 Security

Admin Tool - Add New User

- Click on the User Security link under the Security section in the navigation bar (Figure 9, below)
- Click on the Add New User link
- Enter details about the new user (required fields are denoted with an asterisk *) (phone IDD should be in the format 011 and phone country code in the format 01 only for non-US phone numbers) (Figure 10)
- Click on the checkbox to include user in one or more security groups on the right side
- Click on the Add User button
- A confirmation message will appear when the new user was added (Figure 11)
- An email will be sent with the username and a randomly generated password, which should be changed asap using the Reset password link (Figure 12)

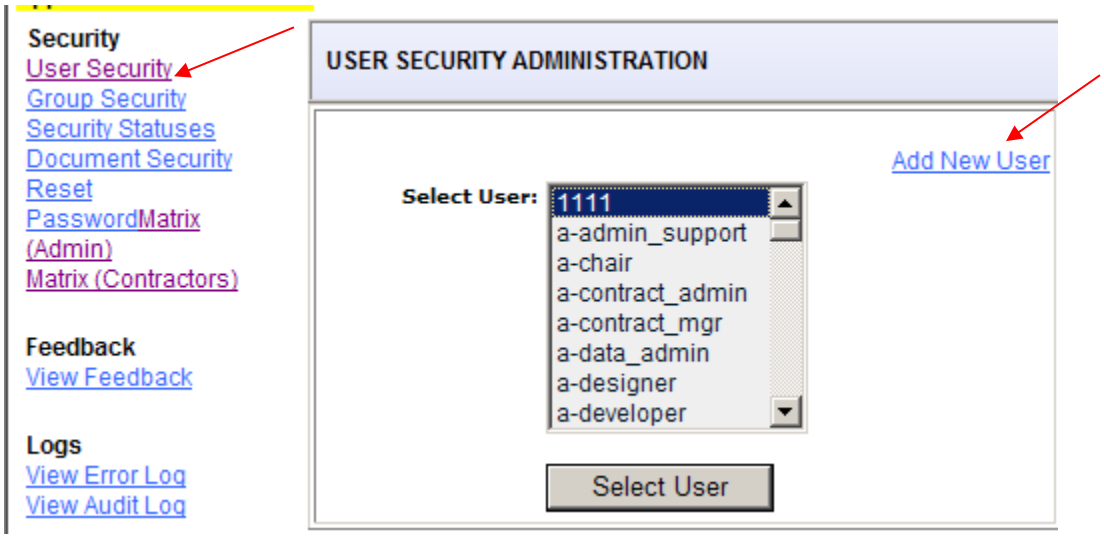


Figure 9 – User Security ink; Add New User link

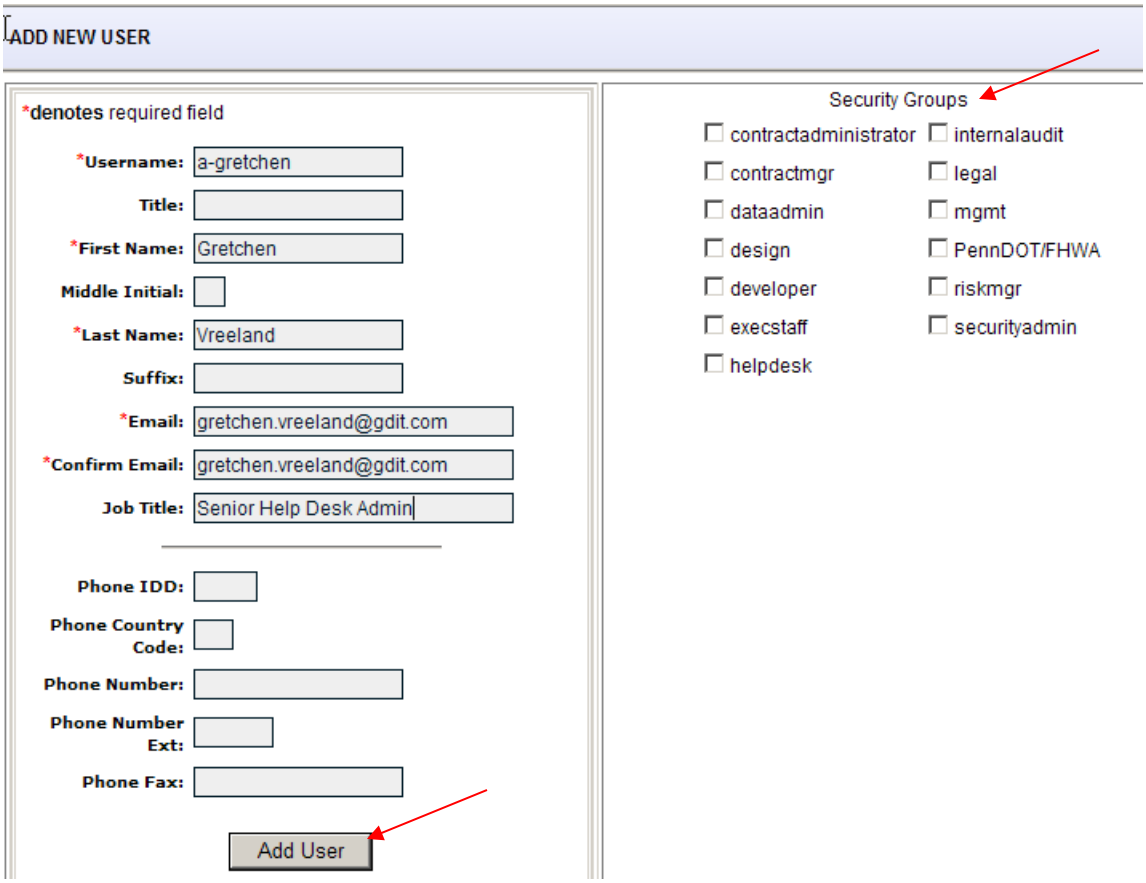


Figure 10 – Add new User page with Security Groups; Add User button

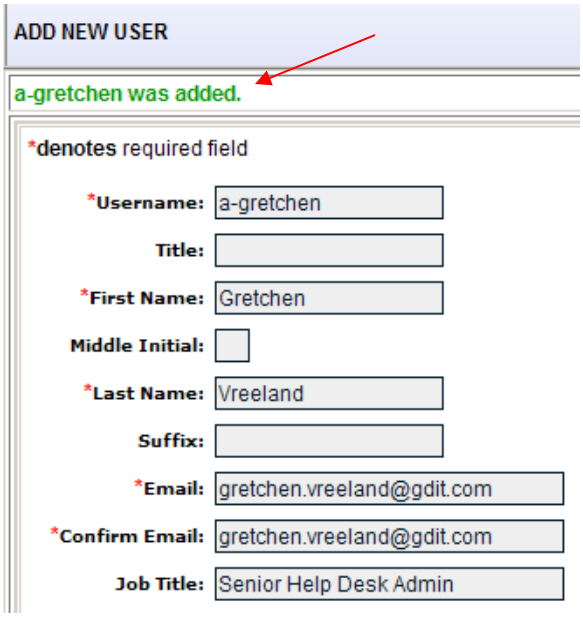


Figure 11 – Confirmation that new user was addded

From: ebshelpdesk@paturnpike.com Sent: Fri 3/18/2011 2:31 P
To: Vreeland, Gretchen
Cc:
Subject: Message from Pennsylvania Turnpike Electronic Bidding Sys
EBS Account Activation
Your EBS account has been created and you may login to the adminstrator section of EBS.
Username: a-gretchen
Password: ?Bu4j2v@
Pennsylvania Turnpike EBS

Figure 12 – Account activation email message

Admin Tool - Edit User Information

- Click on the User Security link under the Security section in the navigation bar (Figure 13, below)
- Select a user name from the list
- Click on the Select User button (Figure 14)
- Update one or more details for the selected user if needed
- Click on the checkboxes to add user to one or more security groups on the right side (Figure 14)
- Click on the Update Groups button
- Click on Update User when task is complete (Figure 15)

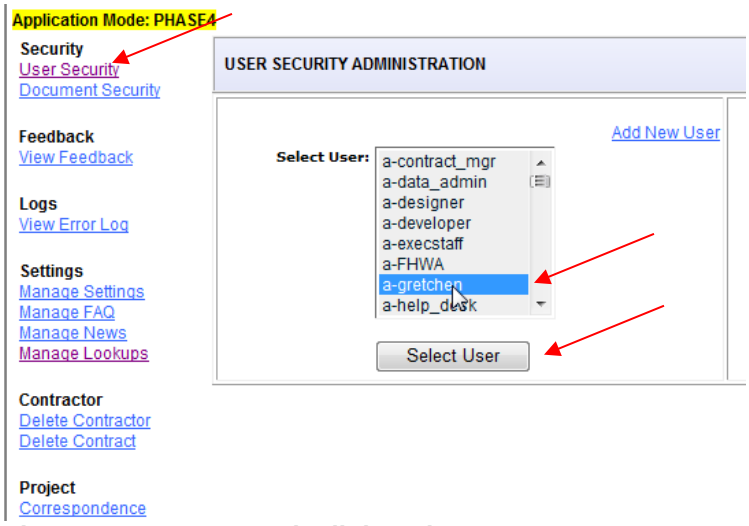


Figure 13 – User Security link; Select User

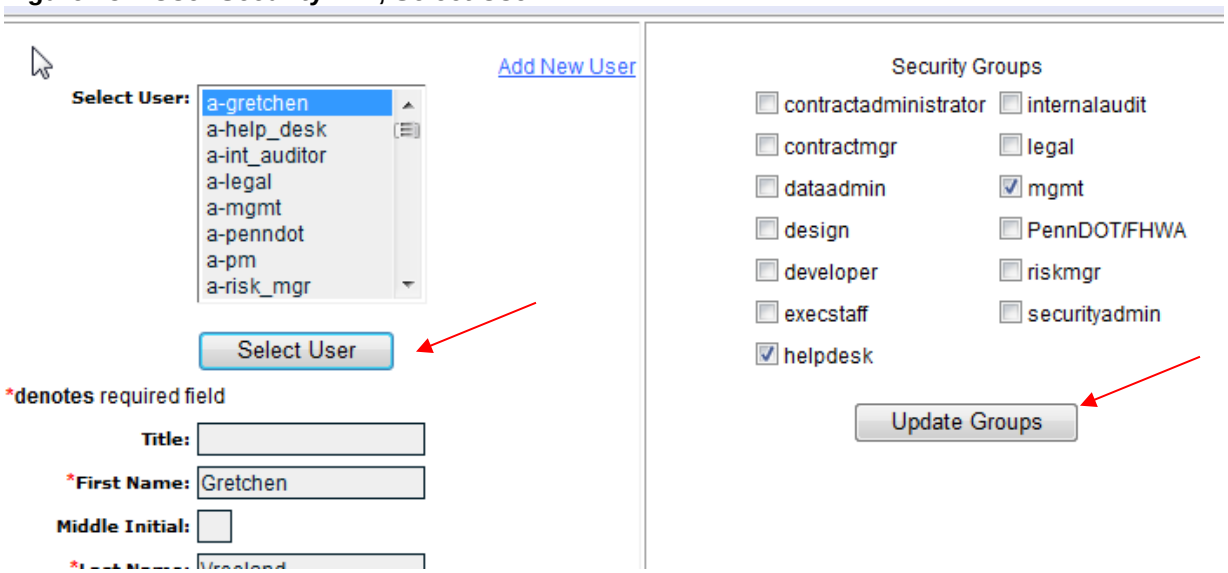


Figure 14 – Update Groups button

Figure 15 – Update User button

Admin Tool - Activate or De-activate User

Procedure:

- Click on the User Security link under the Security section in the navigation bar (Figure 13, above)
- Select a user name from the drop-down list
- Click on the Select User button
- Click on the User Active checkbox (to fill in the checkbox) (Figure 16, below)
- To de-activate the User, click on the User Active checkbox (to empty the checkbox)
- Click on the Update User button

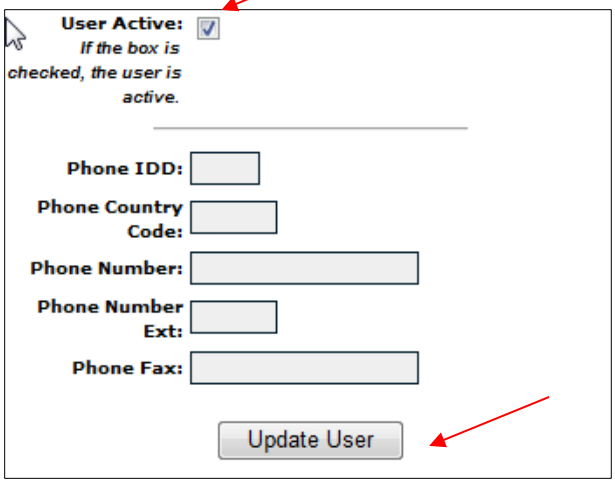


Figure 16 – User Active check box; Update User button

Admin Tool - Manage Security Groups

Add a new Security Group
Procedure:

- Click on the Group Security link under the Security section in the navigation bar (Figure 18, below)
- Click on the Add Group button to add a new security group
  Enter details about the new security group such as Group Name, Description (Figure 19)
- Click on the Internal Group checkbox
  - (if the new group is for Turnpike employees)
  - (or leave the checkbox empty for Contractor security groups)
- Click on the Active checkbox
- Click on the Save Group button to add the new security group

Add new functions to the Security Group
Procedure:

- Click on the Group Security link under the Security section in the navigation bar (Figure 18, below)
- Select the security group that was just added from the drop-down list
- Click on the checkbox for one or more functions on the right side (Figure 21)
- Click on the Apply Functions button (Figure 22)

De-activate the Security Group
Procedure:

- Click on the Group Security link under the Security section in the navigation bar (Figure 18, below)
- Select the security group that was just added from the drop-down list
- Click on the Select button
- Click on the Deactivate Group button to deactivate the new security group (See Figure 23)
- Click on the Activate Group button to reactivate the new security group (See Figure 23)

Delete the Security Group
Procedure:
NOTE: Must be de-activated first

- Click on the Delete Group button to delete the selected group (See Figure 23)

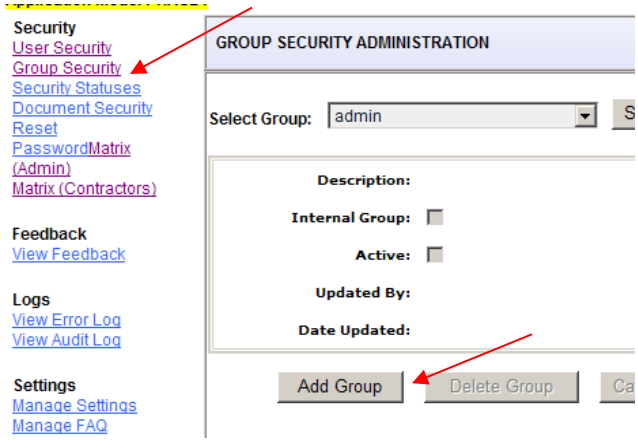


Figure 17 – Group Security link; Add Group button

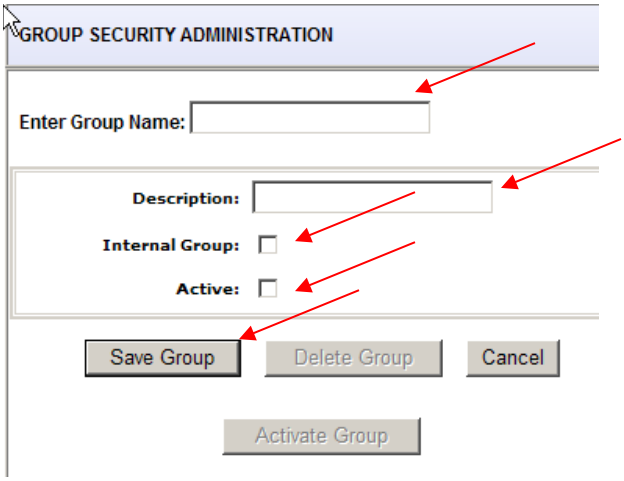


Figure 18 – Add Group information; Save Group button

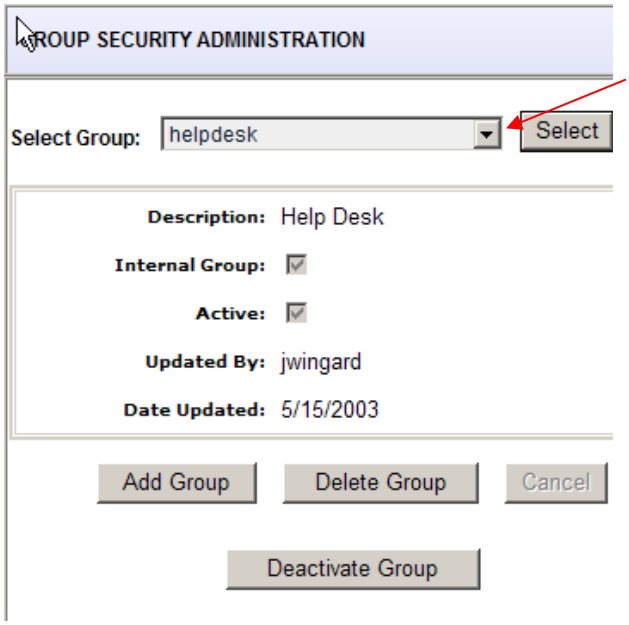


Figure 19 – Group options

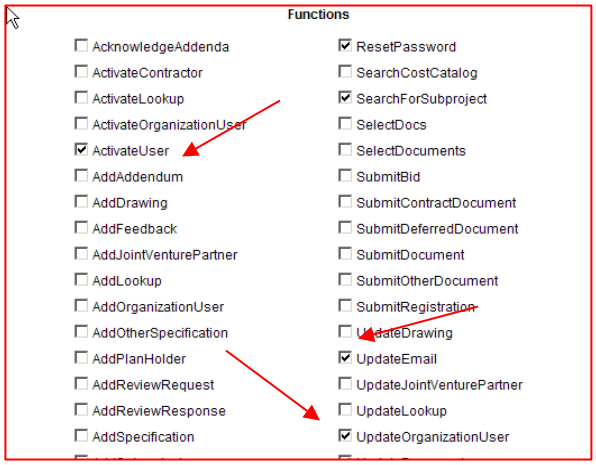


Figure 20 – Assigning group Functions check boxes

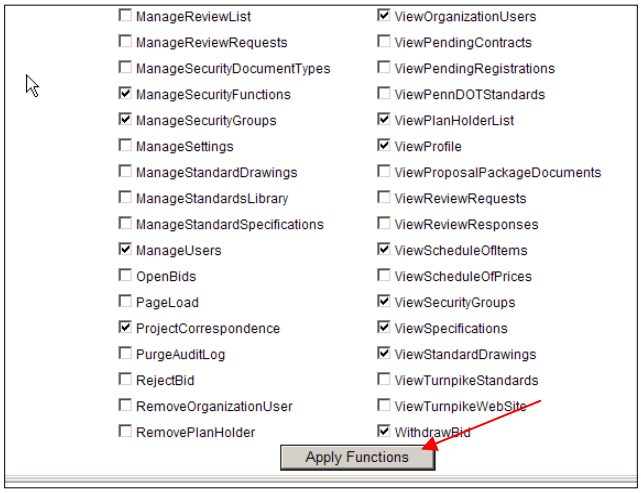


Figure 21 – Apply Functions button

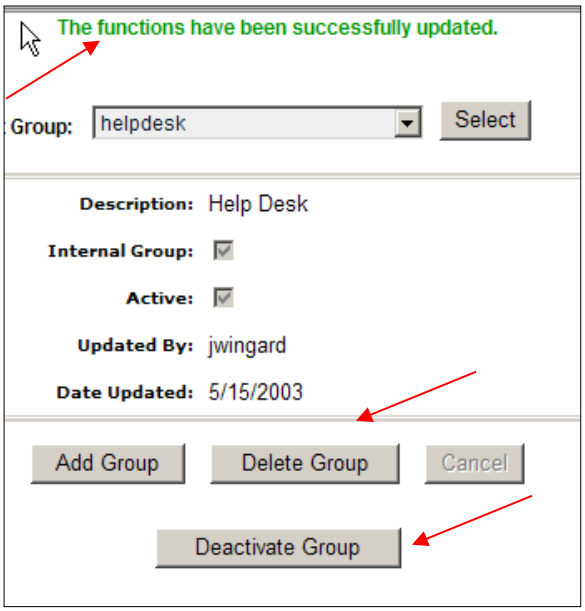


Figure 22 – Deactivate Group button

Admin Tool - Manage Security Functions

Procedure:

- Click on the Group Security button in the navigation bar on the left side (Figure 24, below)
- Click on the drop down list box and select an security group

- Click on the select button to view all functions associated with the security group
- Click on one or more checkboxes next to a function name to assign functions to the security group
- Click on the Apply Functions button to assign the functions (Figure 24)

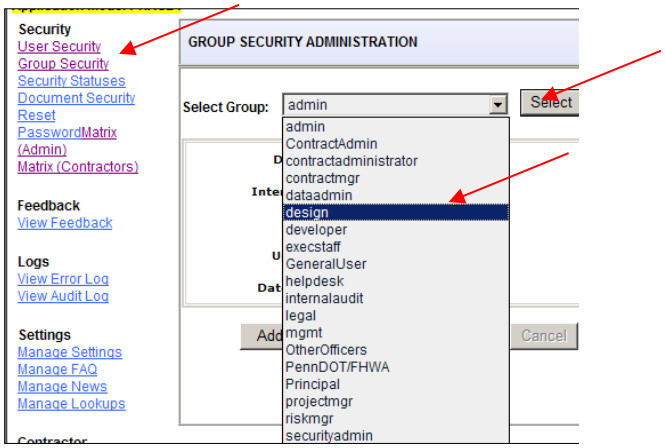


Figure 23 – Group Security selection process

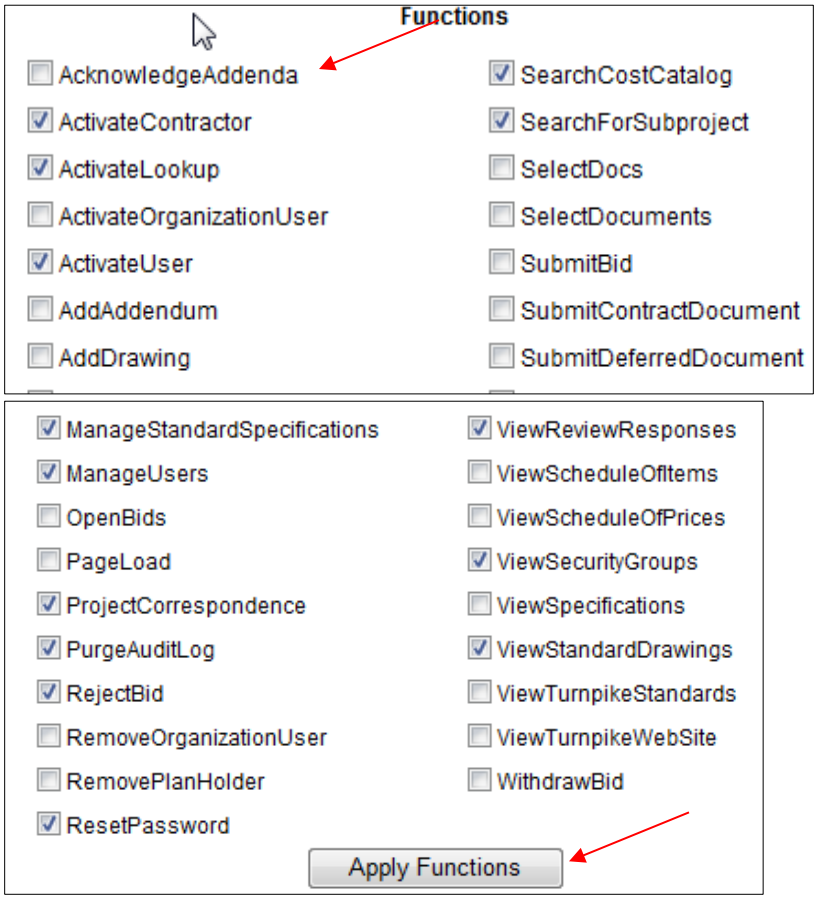


Figure 24 – Apply (Group) Functions button

Admin Tool - Manage Security Statuses

Security Status can be applied at the User level or the Group level to a particular function in EBS. The Status refers to Contract Status in which the user or Group will have rights to perform that particular function in EBS. (See the complete list of Contract Statuses in Figure 27)

For User

Procedure:

- Click on the Security Statuses button in the navigation bar on the left side under the Security Section (Figure 25, below)
- Click on the drop down list box and select a user from the pull-down list (Figure 26)
- Click on the select button to view all functions associated with the user
- Once you find the function you are looking for, click Select
- This will bring up the Contract Statuses screen, where you can see all the statuses applied and remove or add additional statuses (Figure 27)
- Click on the Apply Statuses button to assign and save

For Security Group

Procedure:

- Click on the Security Statuses button in the navigation bar on the left side under the Security Section (Figure 25, below)
- Click on the drop down list box and select an security group item (e.g. legal)
- Click on the select button to view all functions associated with the security group
- Once you find the function you are looking for, click Select (Figure 26)

(NOTE: only select User OR Group)

- This will bring up the Contract Statuses screen, where you can see all the statuses applied and remove or add additional statuses (Figure 27)
- Click on the Apply Statuses button to assign and save

For User Security

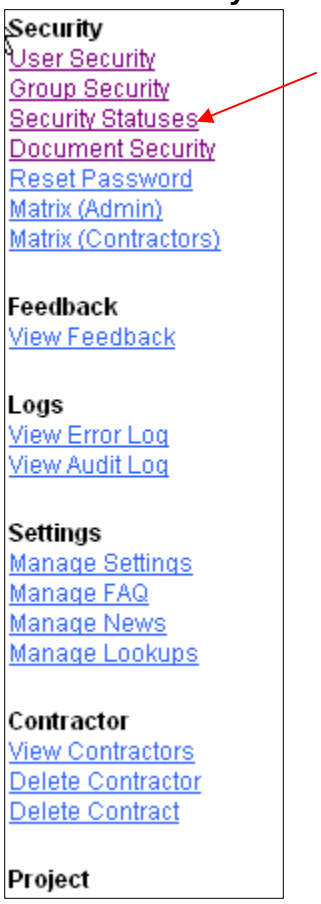


Figure 25 – User Security link

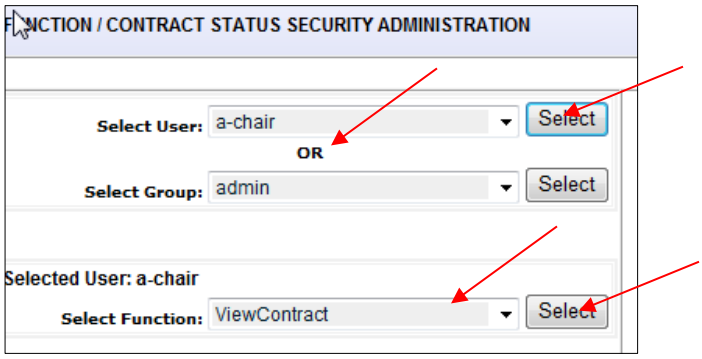


Figure 26 – Select User or Group; then select a Function

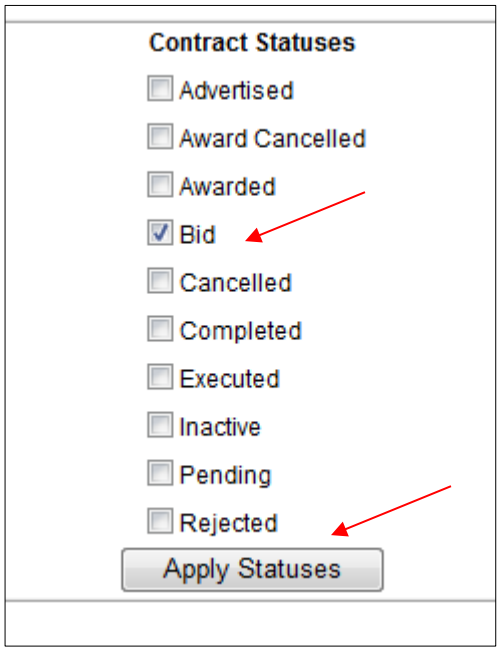


Figure 27 – Next, apply the Contract Status(es) to which that function should apply

For Group Security

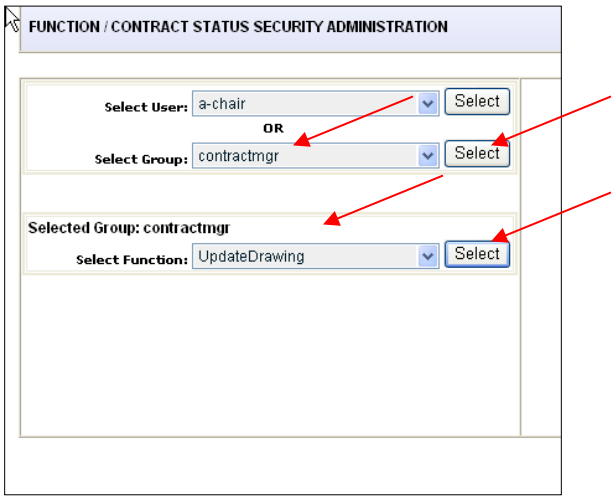


Figure 28 – Select User or Group then Select Function

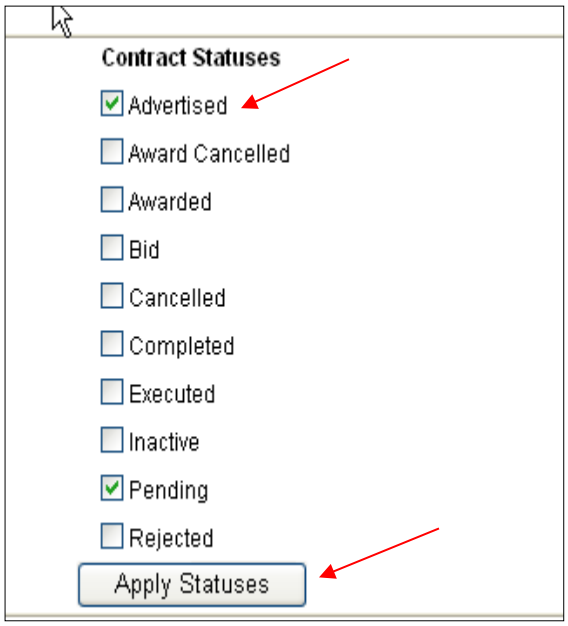


Figure 29 – Apply Contract statuses to function

Admin Tool - Manage Document Security

Security can also be applied at the document level for security groups, if needed. (See Figures 32,32 for a complete list of document types)

Procedure:

- Click on the Document Security link under the Security section in the navigation bar (Figure 30, below)
- Click on the drop down list box and select an security group item (e.g. legal)
- Click on the Select button to view all document types associated with the security group (Figure 31)
- Click on one or more checkboxes next to a document type to assign document types to the security group (Figure 32)
- Click on the Apply Document Types button to assign the document types
- Confirmation message that security has been applied (Figure 33)

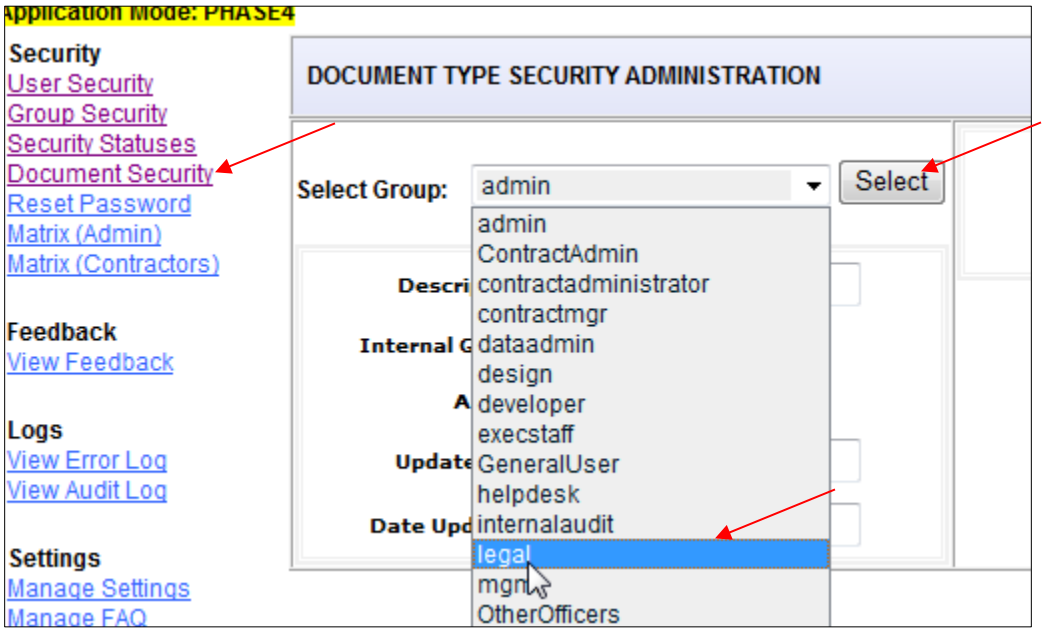


Figure 30 – Document Security link; select Security Group to work with

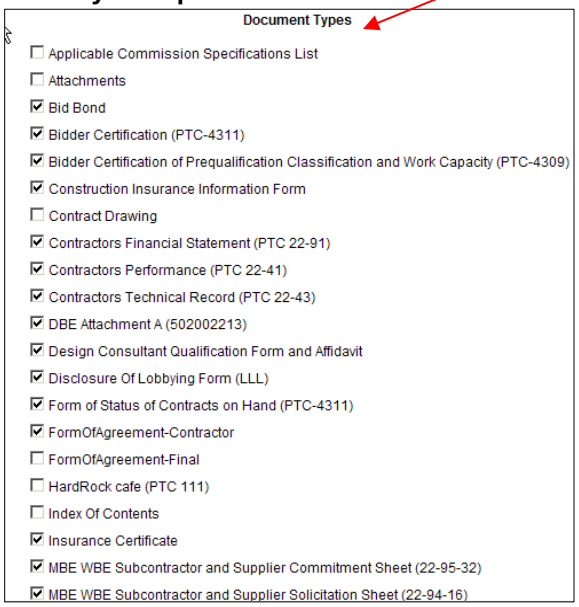

Document Types
Applicable Commission Specifications List
Attachments
Bid Bond
Bidder Certification (PTC-4311)
Bidder Certification of Prequalification Classification and Work Capacity (PTC-4309)
Construction Insurance Information Form
Contract Drawing
Contractors Financial Statement (PTC 22-91)
Contractors Performance (PTC 22-41)
Contractors Technical Record (PTC 22-43)
DBE Attachment A (502002213)
Design Consultant Qualification Form and Affidavit
Disclosure Of Lobbying Form (LLL)
Form of Status of Contracts on Hand (PTC-4311)
FormOfAgreement-Contractor
FormOfAgreement-Final
HardRock cafe (PTC 111)
Index Of Contents
Insurance Certificate
MBE WBE Subcontractor and Supplier Commitment Sheet (22-95-32)
MBE WBE Subcontractor and Supplier Solicitation Sheet (22-94-16)

Figure 31 – Select Document Types

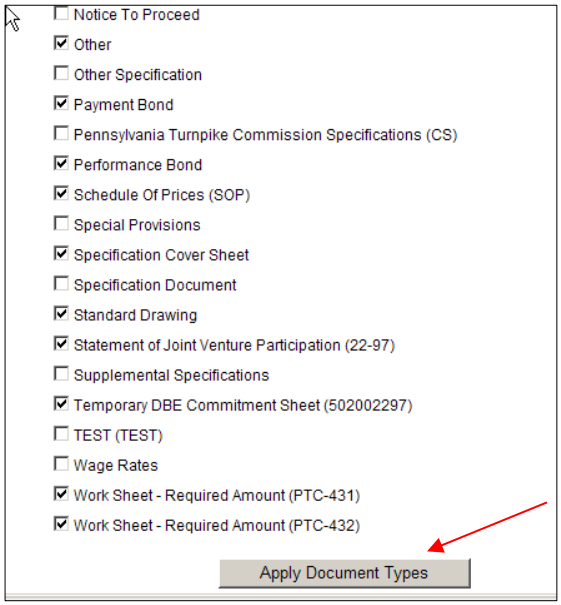


Figure 32 – Apply Document Types button

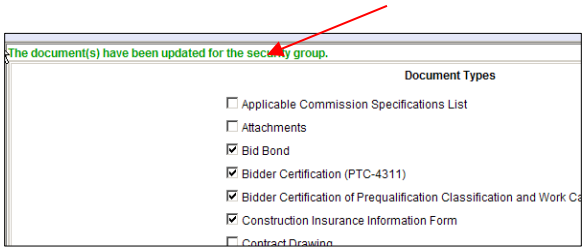


Figure 33 – Confirmation message that documents have been updated

Admin Tool - Reset Password (Admin Tool)

Procedure:

- Click on the Reset Password hyperlink in the shortcut bar at the top of the page
- Enter the username for the person for whom you wish to reset the password (e.g. jdilouie) (Figure 34, below)
- Click the Reset Password button (Figure 35)
- A confirmation message will appear on the screen (Figure 36)
- The user will receive an email message (Figure 37)

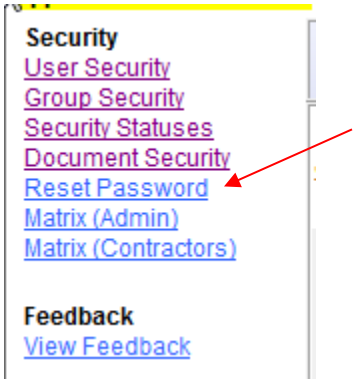


Figure 34 – Reset Password Link

Username: ajackson [Logou
*denotes required field
Reset Password
*Username:
Note: Resetting the user's password will automatically send an email to the user with their new password.
Reset Password

Figure 35 – Reset Password button

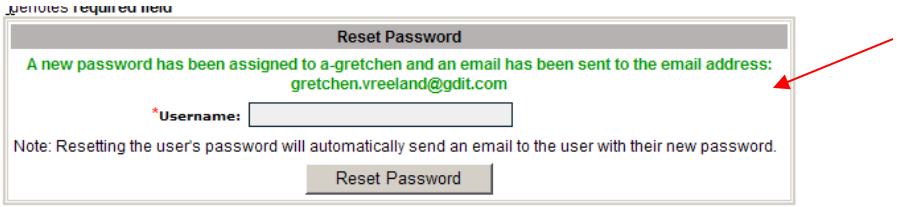

Reset Password
A new password has been assigned to a-gretchen and an email has been sent to the email address: gretchen.vreeland@gdit.com
*Username:
Note: Resetting the user's password will automatically send an email to the user with their new password.
Reset Password

Figure 36 – Reset Password confirmation message

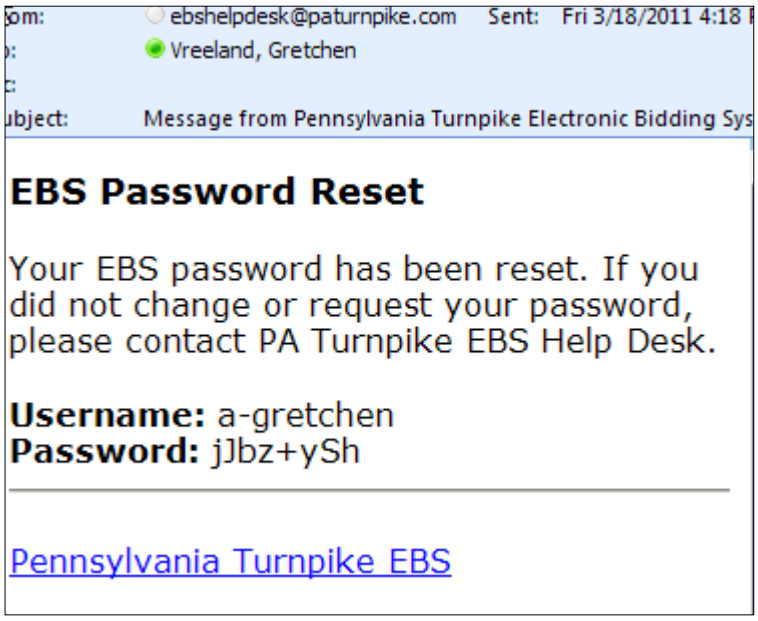

om: ebshelpdesk@paturnpike.com Sent: Fri 3/18/2011 4:18
: Vreeland, Gretchen
:
ubject: Message from Pennsylvania Turnpike Electronic Bidding Sys
EBS Password Reset
Your EBS password has been reset. If you did not change or request your password, please contact PA Turnpike EBS Help Desk.
Username: a-gretchen
Password: jJbz+ySh
Pennsylvania Turnpike EBS

Figure 37 – Reset Password email

Chapter 3 Feedback

The Business Partners have the ability to leave feedback on their web in the MISC. section at the bottom of their left navigation bar. From time to time, a PTC administrator may want to view the feedback.

Admin Tool - View Feedback

Procedure:

- Click on the View Feedback link under the Feedback section in the navigation bar (Figure 38 below)
- Feedback is left by Business Partners on the Business Partner Home Page at a link on the left navigation bar and only read by PTC staff in the Admin Tool (Figure 39)
- Feedback link on the Business Partners site (Figure 40)

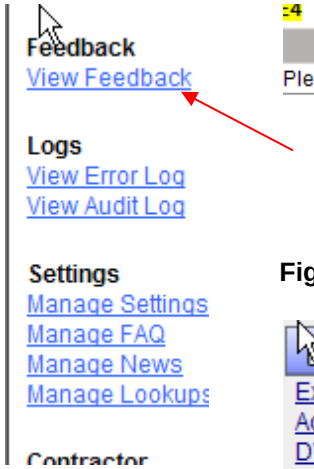


Figure 38 – View Feedback link

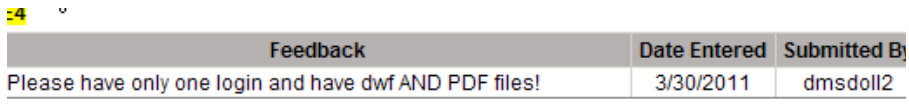


Figure 39 – Feedback pane

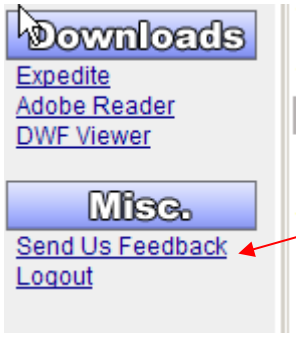


Figure 40 – Send Us feedback link

Chapter 4 Logs

There are two log files maintained in EBS. The first is an audit log of all actions done by EBS users over time. The second is an error log which contains system errors created over time by users.

Admin Tool - Manage Audit Log

Display Log
Procedure:

- Click on the View Audit Log link under the Logs section in the navigation bar (Figure 41, below)
- Enter a begin date and end date to display a list of errors that occurred within a range of dates (Figure 42)
- Click on the Display Log button

Purge Log
Procedure:

- Click on the View Audit Log link under the Logs section in the navigation bar (Figure 41)
- Enter a begin date and end date to display a list of errors that occurred within a range of dates (Figure 42)
- Click on the Purge Log button (Figure 43)
- Confirmation of a successful purge will display (Figure 44)

NOTE: The purged log will be named; copy the file name down and let your Network Admin retrieve it for you as you will not have access to the file on the EBS Production server.

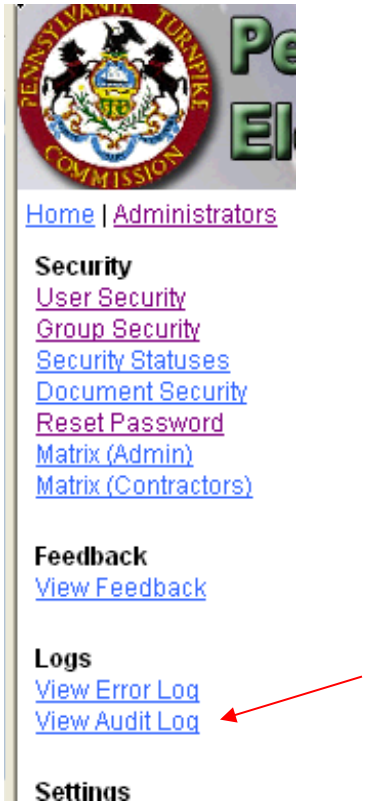


Figure 41 – View Audit Log link

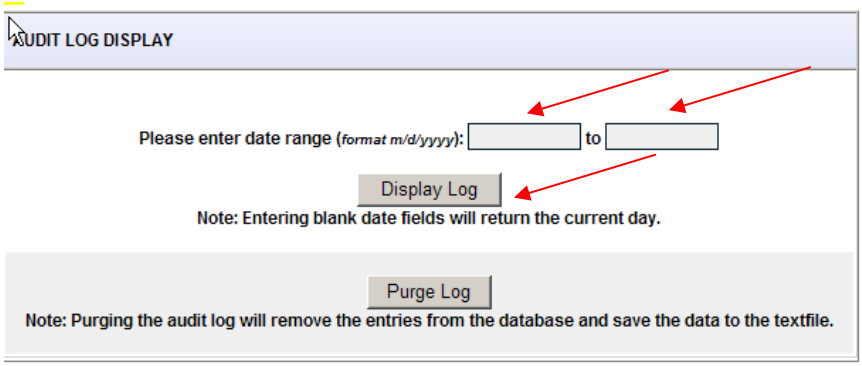

AUDIT LOG DISPLAY
Please enter date range (format m/d/yyyy):
to
Display Log
Note: Entering blank date fields will return the current day.
Purge Log
Note: Purging the audit log will remove the entries from the database and save the data to the textfile.

Figure 42 – Enter date range and click Display Log button

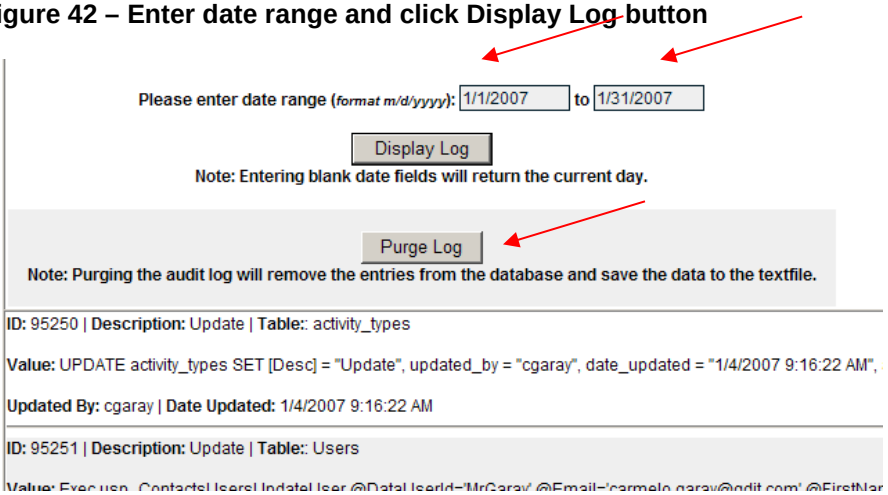

Please enter date range (format m/d/yyyy): 1/1/2007 to 1/31/2007
Display Log
Note: Entering blank date fields will return the current day.
Purge Log
Note: Purging the audit log will remove the entries from the database and save the data to the textfile.
ID: 95250 | Description: Update | Table:: activity_types
Value: UPDATE activity_types SET [Desc] = "Update", updated_by = "cgaray", date_updated = "1/4/2007 9:16:22 AM",
Updated By: cgaray | Date Updated: 1/4/2007 9:16:22 AM
ID: 95251 | Description: Update | Table:: Users

Figure 43 – Purge Log button

Figure 44 – Confirmation of purge and filename of purged audit log

Admin Tool - Manage Error Log

Procedure:

- Click on the View Error Log link under the Logs section in the navigation bar (Figure 45, below)
- Enter a begin date and end date to display a list of errors that occurred within a range of dates (Figure 46)
- Click on the Display Log button

NOTE: There is no Purge option available with the Error Log

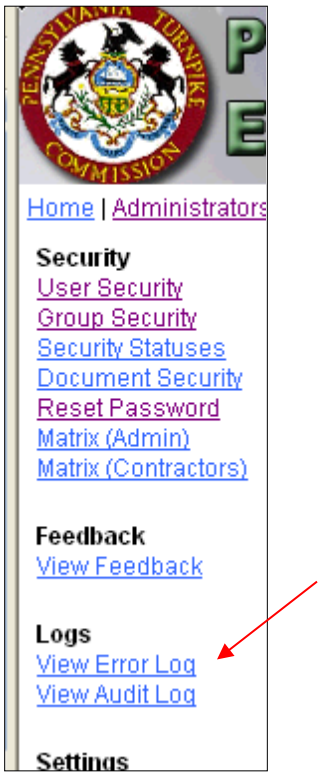


Figure 45 – View Error Log link

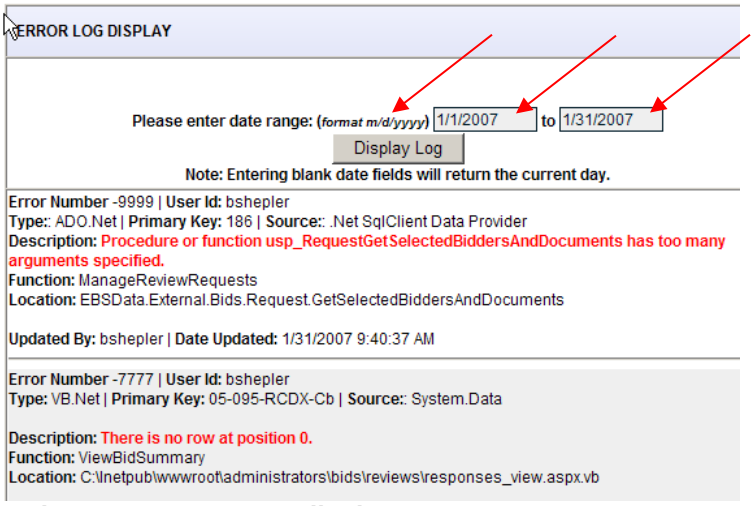

ERROR LOG DISPLAY
Please enter date range: (format m/d/yyyy) 1/1/2007 to 1/31/2007
Display Log
Note: Entering blank date fields will return the current day.
Error Number -9999 | User Id: bshepler
Type:: ADO.Net | Primary Key: 186 | Source:: .Net SqlClient Data Provider
Description: Procedure or function usp_RequestGetSelectedBiddersAndDocuments has too many arguments specified.
Function: ManageReviewRequests
Location: EBSData.External.Bids.Request.GetSelectedBiddersAndDocuments
Updated By: bshepler | Date Updated: 1/31/2007 9:40:37 AM
Error Number -7777 | User Id: bshepler
Type: VB.Net | Primary Key: 05-095-RCDX-Cb | Source:: System.Data
Description: There is no row at position 0.
Function: ViewBidSummary
Location: C:\Inetpub\wwwroot\administrators\bids\reviews\responses_view.aspx.vb

Figure 46 – Error Log display

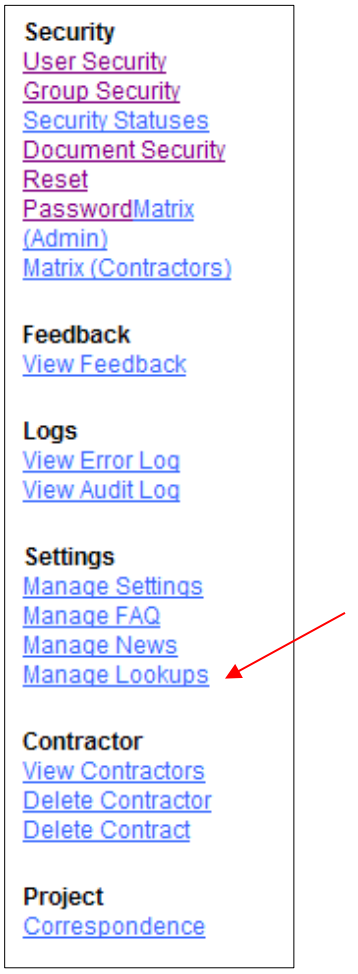
Chapter 5 Settings

The Setting section of the Admin Tool has been designed to allow PTC administrative staff to change many of the program settings on the EBS site themselves. Here is where lookups can be edited, FAQs can be added or edited, News Items may be added, and many document settings can be altered where approver names are changed on a periodic basis.

Admin Tool Add New Item to Lookup

Procedure:

- Click on the Manage Lookups link under the Settings section in the navigation bar (Figure 47,below)
- Select a lookup table name from the drop-down list (Figure 48)
- Click on the Display Values button (Figure 49)
- If the Add (New Item such as Contact) button exists then click on the Add New Item button, enter a Description for the new lookup item and click on the Active checkbox, then click on the Add button (Figure 50)
- If the Add (New Item such as Contact) button does not exist then enter values (such as Description) for the new item then click on the Add [tablename] button (Figure 51 – Add Contact is the item name in this example)



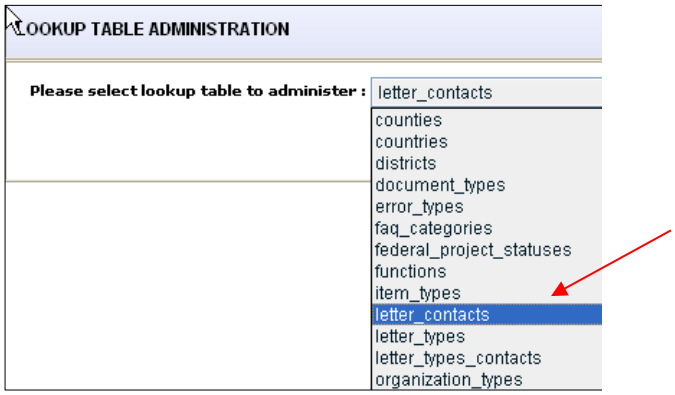


Figure 48 – Choose lookup by name

Figure 47 – Manage Lookups link

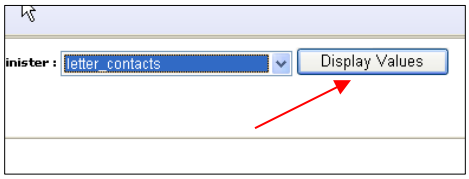


Figure 49 – Display Values of lookup button

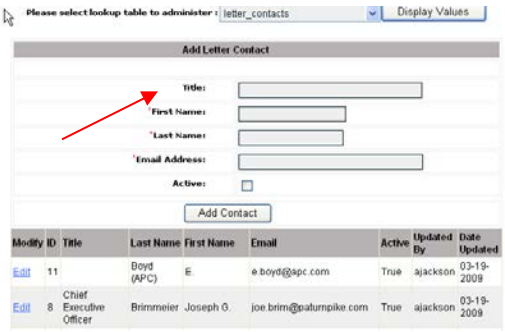

Please select lookup table to administer :
letter_contacts
Display Values
Add Letter Contact
Title:
*First Name:
*Last Name:
*Email Address:
Active:
Add Contact
Modify ID Title Last Name First Name Email Active Updated By Date Updated
Edit 11 Boyd (APC) E. e.boyd@apc.com True ajackson 03-19-2009
Edit 8 Chief Executive Officer Brimmeier Joseph G. joe.brim@paturnpike.com True ajackson 03-19-2009

Figure 50 – Values displayed

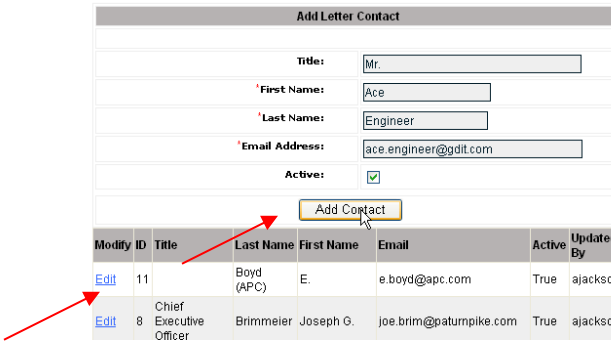


Figure 51 – New Items can be added or existing items can be edited

Admin Tool Activate /Edit Lookup

Procedure:

- Click on the Manage Lookups link under the Settings section in the navigation bar (Figure 52, below)
- Select a table name from the drop-down list (Figure 53)
- Click on the Display Values button
- Click on the Edit, then Update links to edit a lookup item in the list (Figure 54)
- Click on the checkbox in the Active column to make the lookup active
- Confirmation message will appear when lookup has been updated (Figure 55)

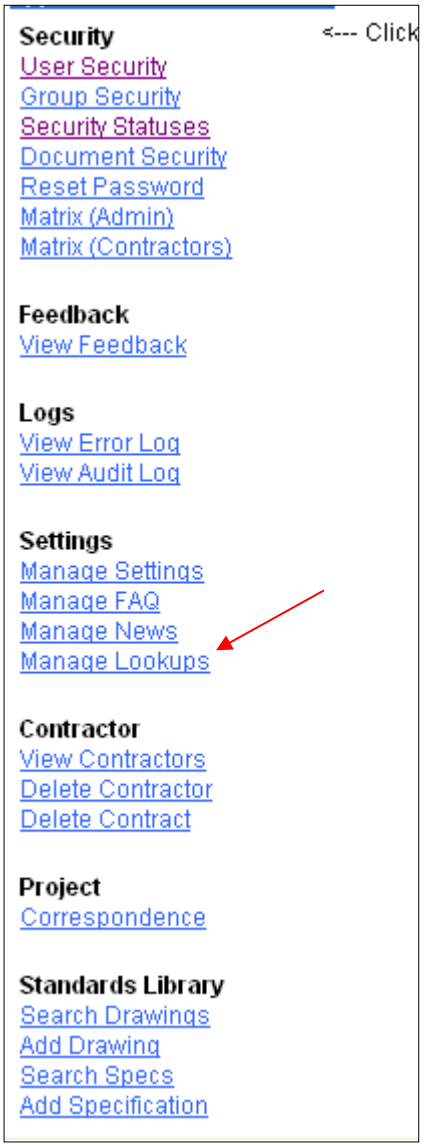


Figure 52 – Manage Lookups link

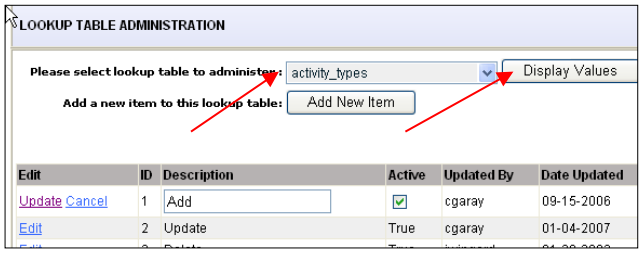

LOOKUP TABLE ADMINISTRATION
Please select lookup table to administer: activity_types
Display Values
Add a new item to this lookup table:
Add New Item
Edit ID Description Active Updated By Date Updated
Update Cancel 1 Add cgaray 09-15-2006
Edit 2 Update True cgaray 01-04-2007

Figure 53 – Select Lookup table from list

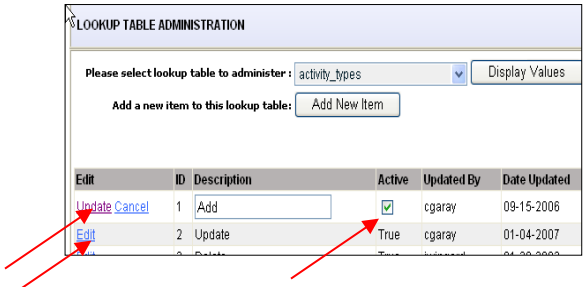

LOOKUP TABLE ADMINISTRATION
Please select lookup table to administer : activity_types
Display Values
Add a new item to this lookup table:
Add New Item
Edit ID Description Active Updated By Date Updated
Update Cancel 1 Add cgaray 09-15-2006
Edit 2 Update True cgaray 01-04-2007

Figure 54 – Update or Cancel Lookup description; change active/non-active status

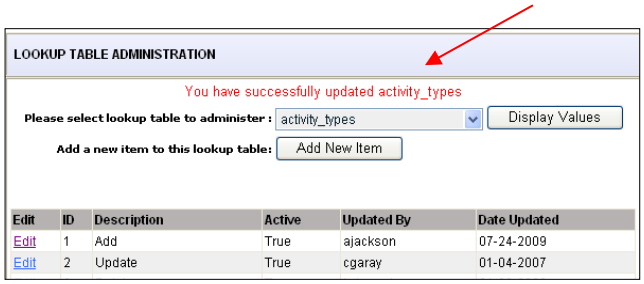

LOOKUP TABLE ADMINISTRATION
You have successfully updated activity_types
Please select lookup table to administer : activity_types
Display Values
Add a new item to this lookup table:
Add New Item
Edit ID Description Active Updated By Date Updated
Edit 1 Add True ajackson 07-24-2009
Edit 2 Update True cgaray 01-04-2007

Figure 55 – Confirmation that Lookup has been succesfully updated

Admin Tool - Deactivate Lookup

Procedure:

- Click on the Manage Lookups link under the Settings section in the navigation bar (Figure 56, below)
- Select a table name from the drop-down list (Figure 57)
- Click on the Display Values button
- Click on the Edit link for a lookup item in the list (Figure 58)
- Click on the checkbox in the Active column so that the checkbox is de-selected (Figure 69)
- Click on the Update link
- Confirmation message will appear when lookup has been updated (Figure 60)

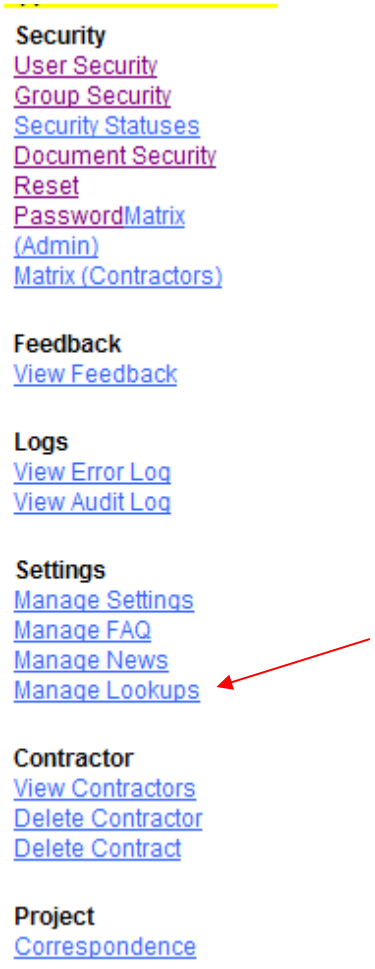


Figure 56 – Manage Lookups link

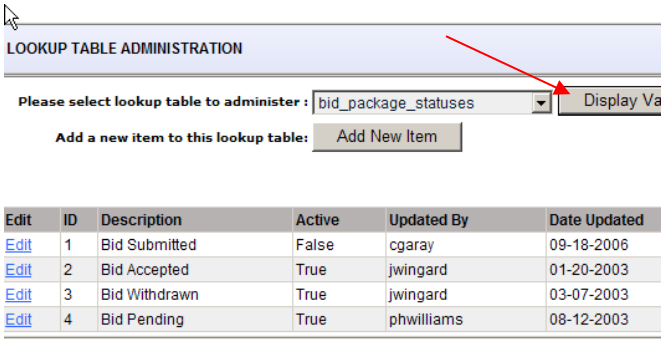

LOOKUP TABLE ADMINISTRATION
Please select lookup table to administer : bid_package_statuses
Display Va
Add a new item to this lookup table: Add New Item
Edit | ID | Description | Active | Updated By | Date Updated
Edit | 1 | Bid Submitted | False | cgaray | 09-18-2006
Edit | 2 | Bid Accepted | True | jwingard | 01-20-2003
Edit | 3 | Bid Withdrawn | True | jwingard | 03-07-2003
Edit | 4 | Bid Pending | True | phwilliams | 08-12-2003

Figure 57 – Select Lookup table from list; then click Display Values button

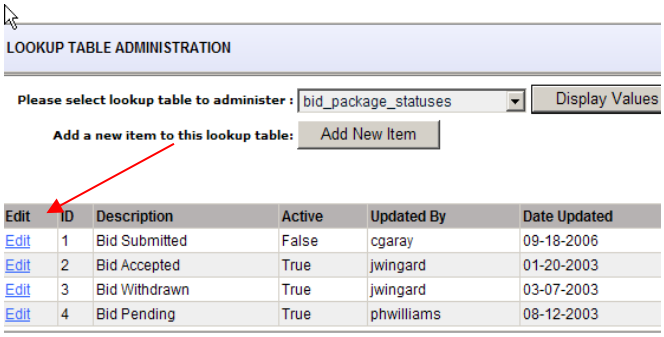

LOOKUP TABLE ADMINISTRATION
Please select lookup table to administer : bid_package_statuses
Display Values
Add a new item to this lookup table: Add New Item
Edit | ID | Description | Active | Updated By | Date Updated
Edit | 1 | Bid Submitted | False | cgaray | 09-18-2006
Edit | 2 | Bid Accepted | True | jwingard | 01-20-2003
Edit | 3 | Bid Withdrawn | True | jwingard | 03-07-2003
Edit | 4 | Bid Pending | True | phwilliams | 08-12-2003

Figure 58 – Click on the Edit link

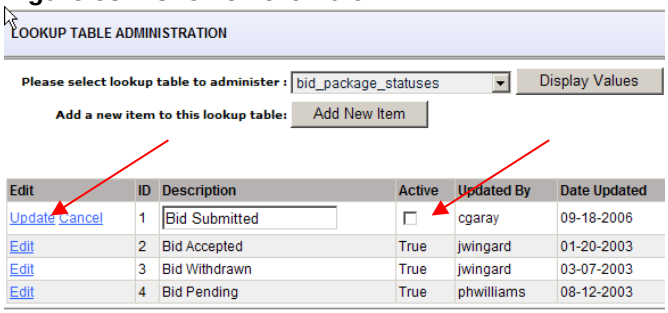

LOOKUP TABLE ADMINISTRATION
Please select lookup table to administer : bid_package_statuses
Display Values
Add a new item to this lookup table: Add New Item
Edit | ID | Description | Active | Updated By | Date Updated
Update Cancel | 1 | Bid Submitted | | cgaray | 09-18-2006
Edit | 2 | Bid Accepted | True | jwingard | 01-20-2003
Edit | 3 | Bid Withdrawn | True | jwingard | 03-07-2003
Edit | 4 | Bid Pending | True | phwilliams | 08-12-2003

Figure 59 – Click on the Active checkbox to activate/de-activate

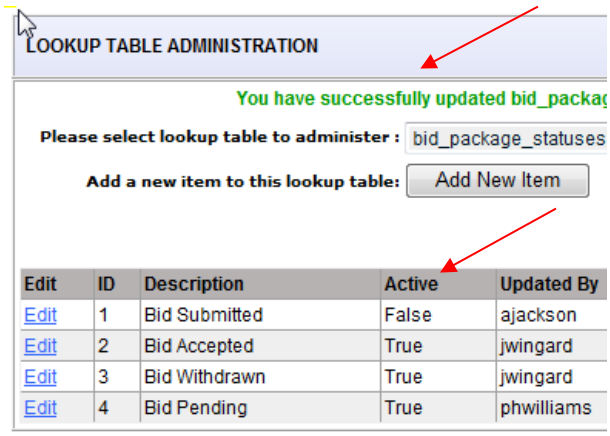

LOOKUP TABLE ADMINISTRATION
You have successfully updated bid_packag
Please select lookup table to administer : bid_package_statuses
Add a new item to this lookup table: Add New Item
Edit | ID | Description | Active | Updated By
Edit | 1 | Bid Submitted | False | ajackson
Edit | 2 | Bid Accepted | True | jwingard
Edit | 3 | Bid Withdrawn | True | jwingard
Edit | 4 | Bid Pending | True | phwilliams

Figure 60 – Receive confirmation of update; notice Active column - status

Admin Tool - Update Lookup

Procedure:

- Click on the Manage Lookups link under the Settings section in the navigation bar (Figure 56,above)
- Select a table name from the drop-down list (Figure 61, below))
- Click on the Display Values button
- Click on the Edit link for a lookup item in the list you wish to update
- Update the Description data field (Figure 62)
- Optionally, update additional data fields for additional lookup item for certain lookup tables
- Click on the Update link to update the lookup item or click on the Cancel link to exit without saving your changes
- Confirmation message will appear when lookup has been updated

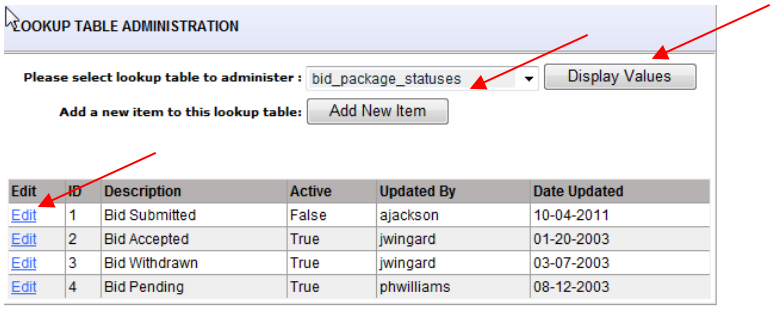

LOOKUP TABLE ADMINISTRATION
Please select lookup table to administer : bid_package_statuses
Display Values
Add a new item to this lookup table: Add New Item
Edit | ID | Description | Active | Updated By | Date Updated
Edit | 1 | Bid Submitted | False | ajackson | 10-04-2011
Edit | 2 | Bid Accepted | True | jwingard | 01-20-2003
Edit | 3 | Bid Withdrawn | True | jwingard | 03-07-2003
Edit | 4 | Bid Pending | True | phwilliams | 08-12-2003

Figure 61 – Lookup table administration

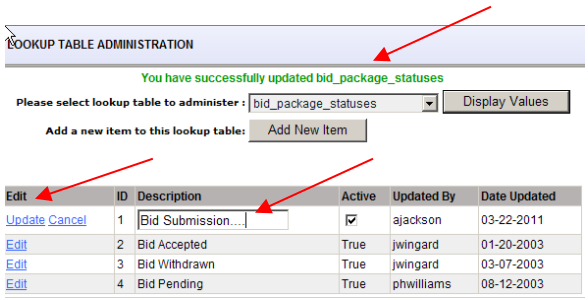


Figure 62 – Edit Description, Update the field; receive confirmation message

Admin Tool - Manage Frequently Asked Questions

CREATING A NEW FAQ

Procedure:

- Click on the Manage FAQ link under the Settings section in the navigation bar (Figure 63, below)
- Click on the Add FAQ button (Figure 64)
- Choose the Category, Sequence, Question, Answer, ValidFromDate, and ValidToDate for the item (Figure 65)
    - The Category will determine the broad EBS category the FAQ is in, i.e. Addenda, Bid Opening/Award, etc.
    - The Sequence number will determine where the FAQ will be listed in numerical sequence within the category sections, i.e. 0 is first, 1 is second, etc.
    - The Question is a text box, which poses the frequently asked question
    - The Description is a text box
    - The ValidFromDate, and ValidToDate for the item will determine when the FAQ is published (visible) on the web site
- Click on the Update FAQ button (Figure 66)
- Click on the Manage FAQ link under the Settings section in the navigation bar to refresh the list (Figure 67)

EDITING AN EXISTING FAQ

Procedure:

- Click on the Update FAQ hyperlink when you need to edit an existing FAQ (Figure 69)
- Change one or more FAQ fields (Figure 70)
- Click on the Update FAQ button to update the FAQ
- Click on the Manage FAQ link under the Settings section in the navigation bar to refresh the list (Figure 68)

DELETING AN FAQ

Procedure:

- Click on the Delete FAQ hyperlink for the item you just created and updated
- Click on the Delete FAQ button to confirm the deletion (Figure 71)
- Click on the Manage FAQ link under the Settings section in the navigation bar to refresh the list (Figure 68)

NOTE: You may enter HTML tag values to format each FAQ item if desired, such as:

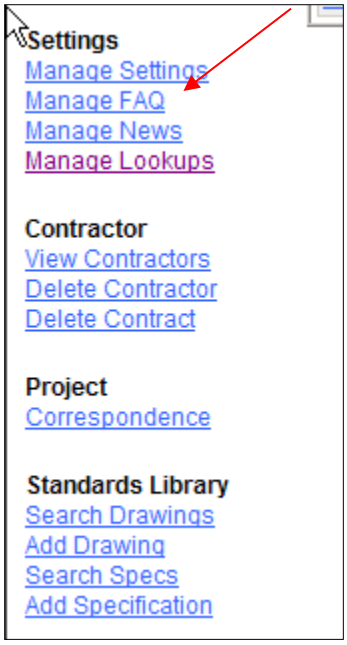


Figure 63 – Manage FAQ link

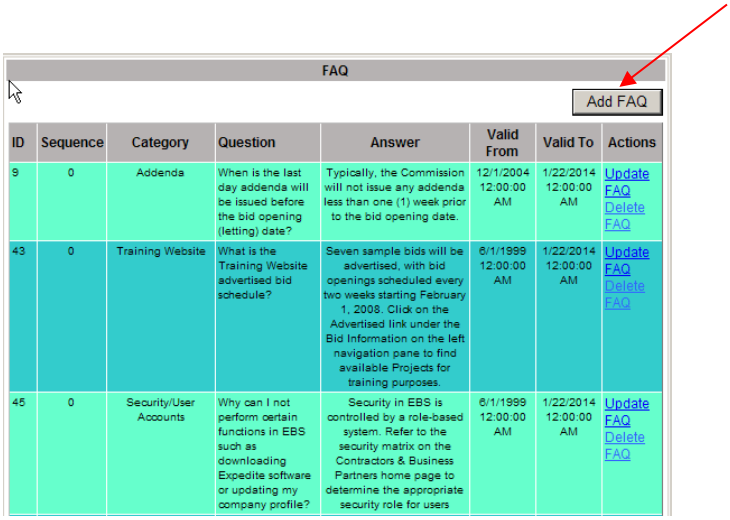

FAQ
Add FAQ
ID
Sequence
Category
Question
Answer
Valid From
Valid To
Actions
9
0
Addenda
When is the last day addenda will be issued before the bid opening (letting) date?
Typically, the Commission will not issue any addenda less than one (1) week prior to the bid opening date.
12/1/2004 12:00:00 AM
1/22/2014 12:00:00 AM
Update FAQ
Delete FAQ
43
0
Training Website
What is the Training Website advertised bid schedule?
Seven sample bids will be advertised, with bid openings scheduled every two weeks starting February 1, 2008. Click on the Advertised link under the Bid Information on the left navigation pane to find available Projects for training purposes.
6/1/1999 12:00:00 AM
1/22/2014 12:00:00 AM
Update FAQ
Delete FAQ
45
0
Security/User Accounts
Why can I not perform certain functions in EBS such as downloading Expedite software or updating my company profile?
Security in EBS is controlled by a role-based system. Refer to the security matrix on the Contractors & Business Partners home page to determine the appropriate security role for users
6/1/1999 12:00:00 AM
1/22/2014 12:00:00 AM
Update FAQ
Delete FAQ

Figure 64 – Add FAQ button

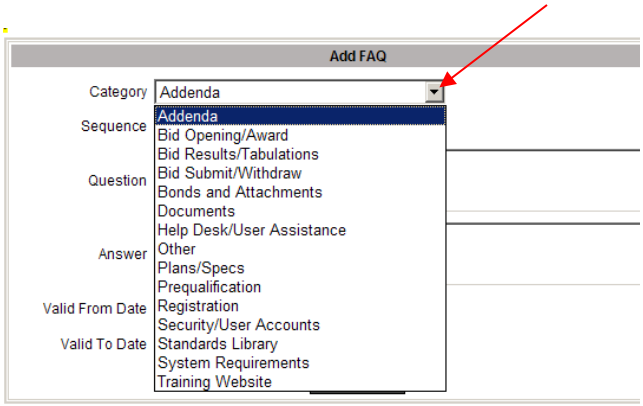


Figure 65 – Decide which FAQ Category, etc

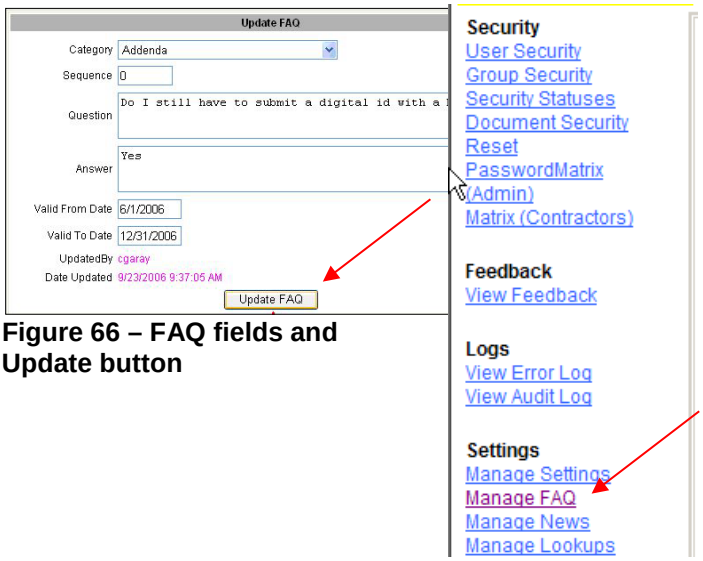


Figure 66 – FAQ fields and Update button

Figure 67 – Manage FAQ link

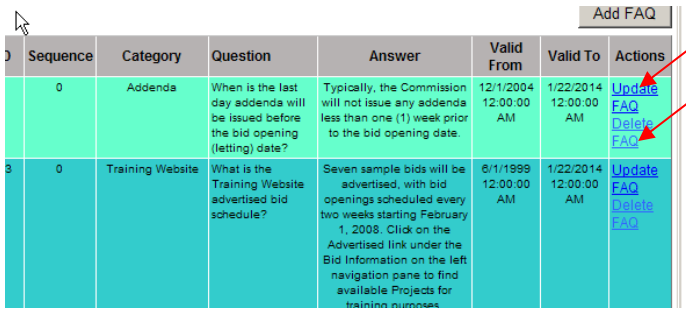

Add FAQ
Sequence
Category
Question
Answer
Valid From
Valid To
Actions
0
Addenda
When is the last day addenda will be issued before the bid opening (letting) date?
Typically, the Commission will not issue any addenda less than one (1) week prior to the bid opening date.
12/1/2004 12:00:00 AM
1/22/2014 12:00:00 AM
Update FAQ
Delete FAQ
0
Training Website
What is the Training Website advertised bid schedule?
Seven sample bids will be advertised, with bid openings scheduled every two weeks starting February 1, 2008. Click on the Advertised link under the Bid Information on the left navigation pane to find available Projects for
6/1/1999 12:00:00 AM
1/22/2014 12:00:00 AM
Update FAQ
Delete FAQ

Figure 68 – Update and Delete FAQ links in Actions column

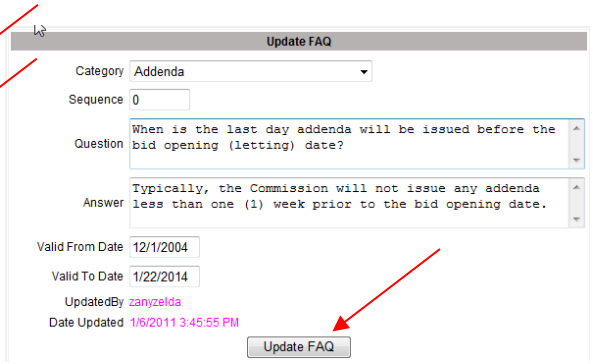

Update FAQ
Category Addenda
Sequence 0
Question When is the last day addenda will be issued before the bid opening (letting) date?
Answer Typically, the Commission will not issue any addenda less than one (1) week prior to the bid opening date.
Valid From Date 12/1/2004
Valid To Date 1/22/2014
UpdatedBy zanyzelda
Date Updated 1/6/2011 3:45:55 PM
Update FAQ

Figure 69 – Edit any of the FAQ fields; then click the Update button

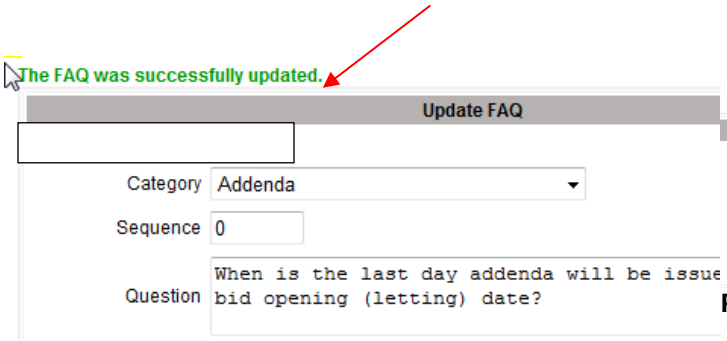

The FAQ was successfully updated.
Update FAQ
Category Addenda
Sequence 0
Question When is the last day addenda will be issue
bid opening (letting) date?

Figure 70 – Confirmation message of successful update

Figure 71 – Asking to confirm deletion of FAQ

Admin Tool - Add New FAQ Category

Procedure:

- Click on the Manage FAQ link under the Settings section in the navigation bar (Figure 72, below)
- Select the table name from the drop-down list **faq_categories** (Figure 73)
- Click on the Display Values button
- Enter a Description for the new FAQ category, enter a Sequence Number, then click on the Active checkbox, then click on the Add FAQ button
- FAQs are in alphabetical order; find the appropriate sequence number to position the category name alphabetically in the list of categories
- Once created, FAQs may be edited by clicking on the Edit link in the Modify column (Figure 73)

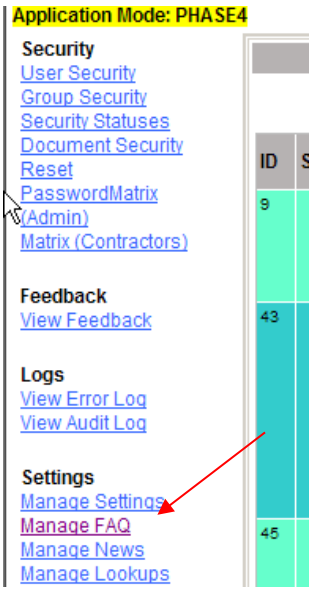


Figure 72 – Manage FAQ link

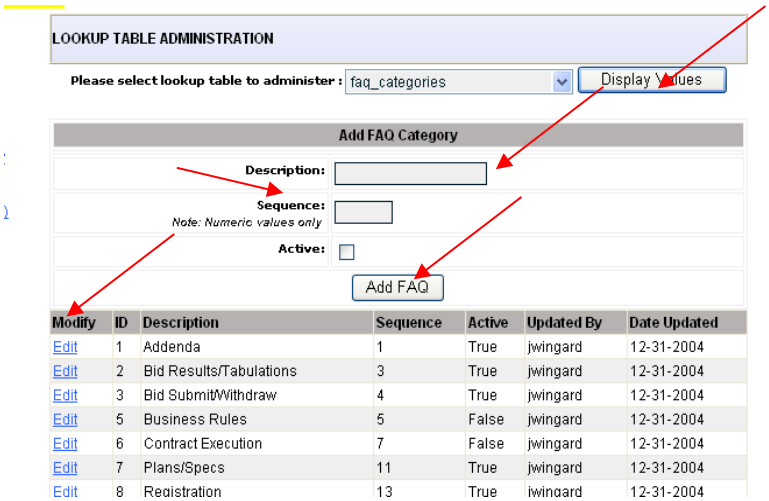


Figure 73 – Add FAQ Category steps

Admin Tool - Manage News

Procedure:
TO ADD A NEWS ITEM:

- Click on the Manage News link under the Settings section in the navigation bar (Figure 74, below)
- Click on the Add News button (Figure 75)
- Type the Sequence, Title, Description, ValidFromDate, and ValidToDate for the item, Browse and upload attachment (Figure 76)

- Click on the Add News button
- Click on the Manage News link under the Settings section in the navigation bar to refresh the list

TO UPDATE A NEWS ITEM:

- Click on the Update News hyperlink in the Actions column for a news item in the list (Figure 75)
  Change one or more values for the news item
- Click on the Add or Update News button to update the news item (Figure 76)

TO DELETE A NEWS ITEM:

- Click on the Manage News link under the Settings section in the navigation bar to refresh the list (Figure 77, below)
- Click on the Delete News hyperlink for the item you wish to delete (Figure 78)
- Click on the Delete News button to confirm the deletion (Figure 79)
- Confirmation message will appear when news item has been deleted (Figure 80)
- Click on the Manage News link under the Settings section in the navigation bar to refresh the list

NOTE: You may enter HTML tag values to format each news item.

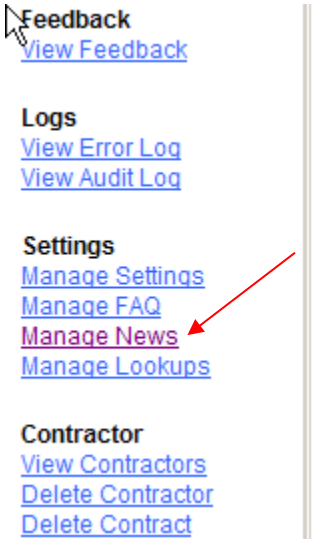


Figure 74 – Manage News link

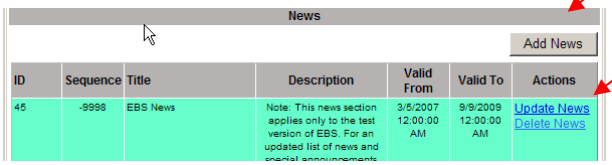


Figure 75 – Update News item link

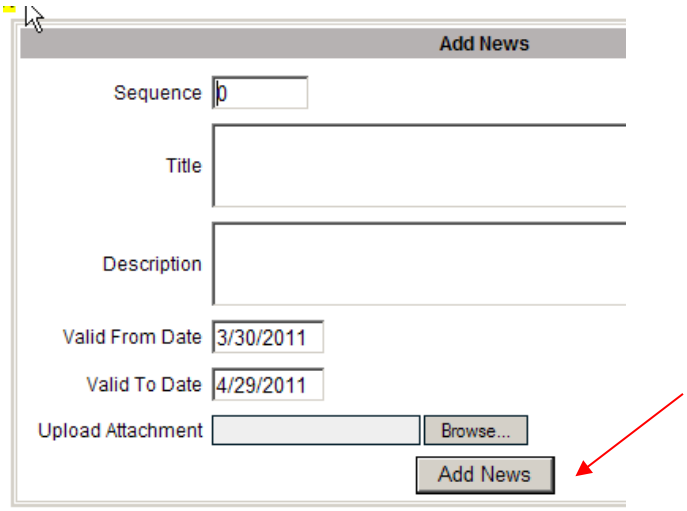


Figure 76 – Add News criteria, then click Add News button

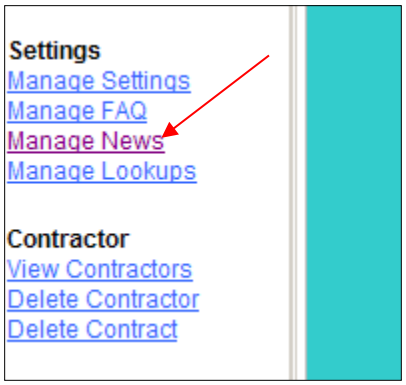


Figure 77 – Manage New link

Figure 78 – Delete News link

Figure 79 – Delete News button

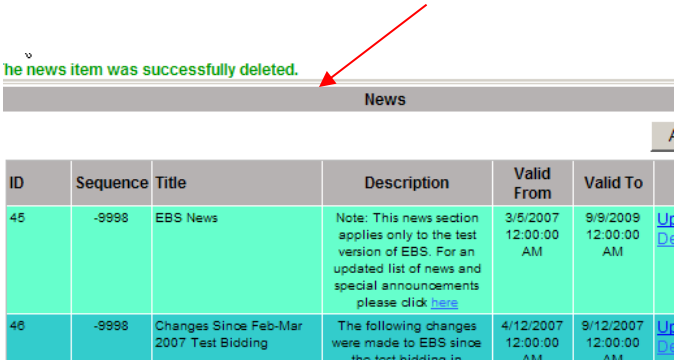


Figure 80 – Confirmation message after successful deletion

Admin Tool - Manage Settings

Procedure:

- Click on the Manage Settings link under the Settings section in the navigation bar (Figure 81 below)
- Click on the Add New Setting hyperlink at the bottom of the page
- Type a Setting Name and Setting Value (Figure 82)
- Click on the Add button
- If you need to Edit, Activate or Re-active the Setting (Figure 83)
- Click on the Edit button and change the setting name or setting value
- Click on the Update button after editing an item (Figure 84)
- Click on the Activate/Deactivate hyperlink for the setting – it is a toggle (Figure 83)
- Click on the Activate/Deactivate button to confirm activation/deactivation of the setting (Figure 85)
- Confirmation message will appear when the setting has been activated/deactivated (Figure 86)
- Click on the Delete hyperlink for a setting to delete (Figure 87)
- Click on the Delete button to confirm deletion of the setting (Figure 88)
- Confirmation message will appear when news item has been deleted (Figure 89)

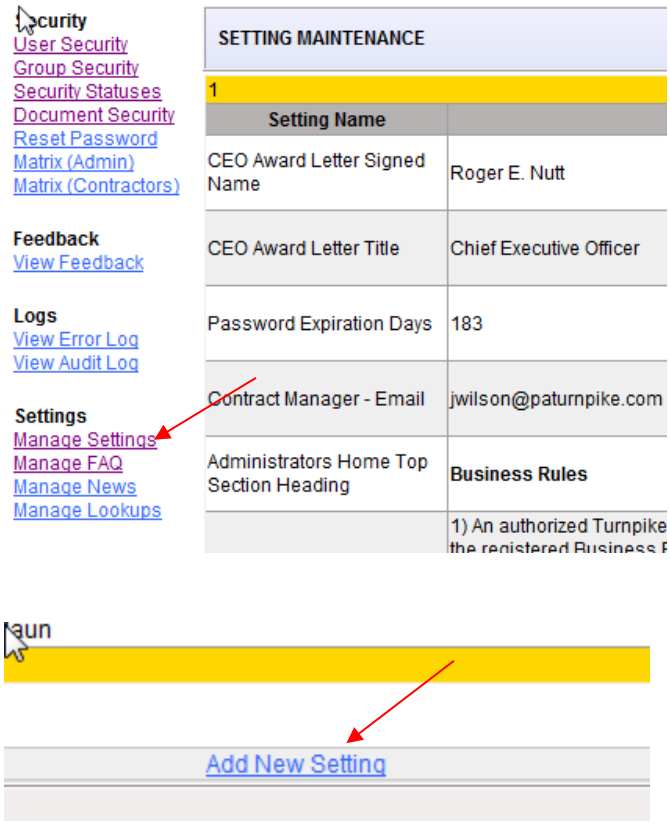


Figure 81 – Manage Settings; Add New setting

links

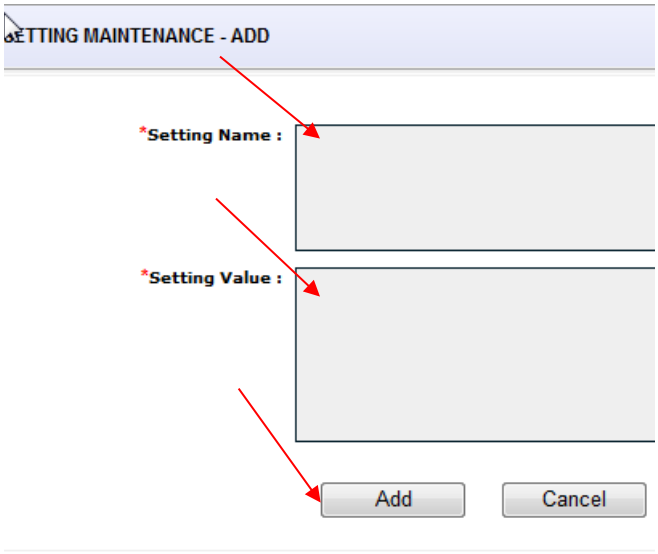


Figure 82 – Enter Sering Name and Value, then click Add button

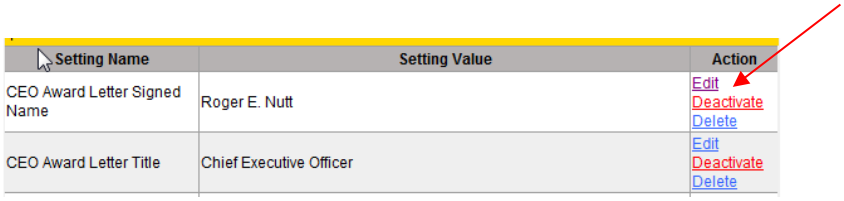


Figure 83 – Click Edit link to edit existing sertting

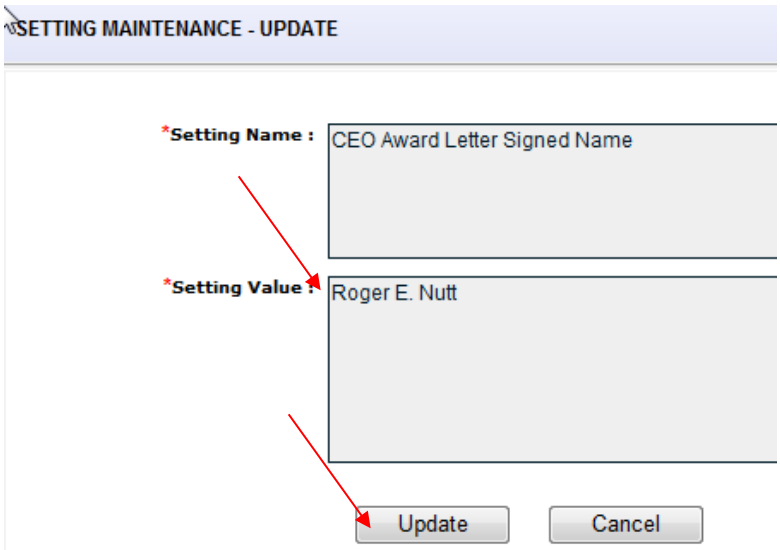


Figure 84 – Click Update button

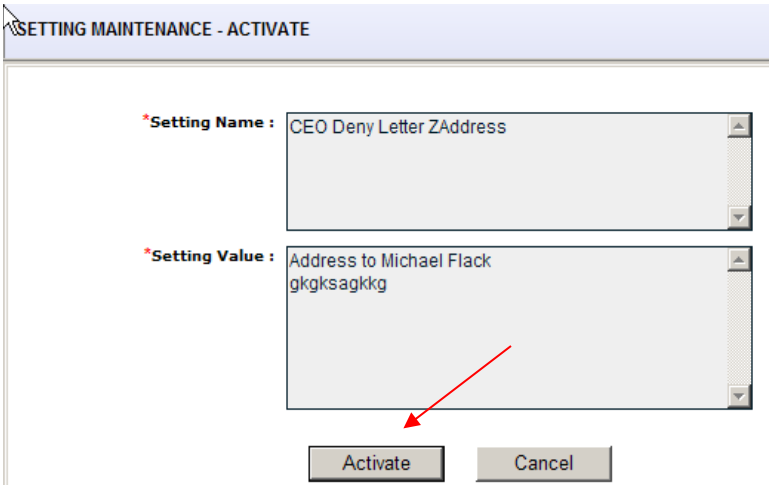


Figure 85 – Click Activate button to publish

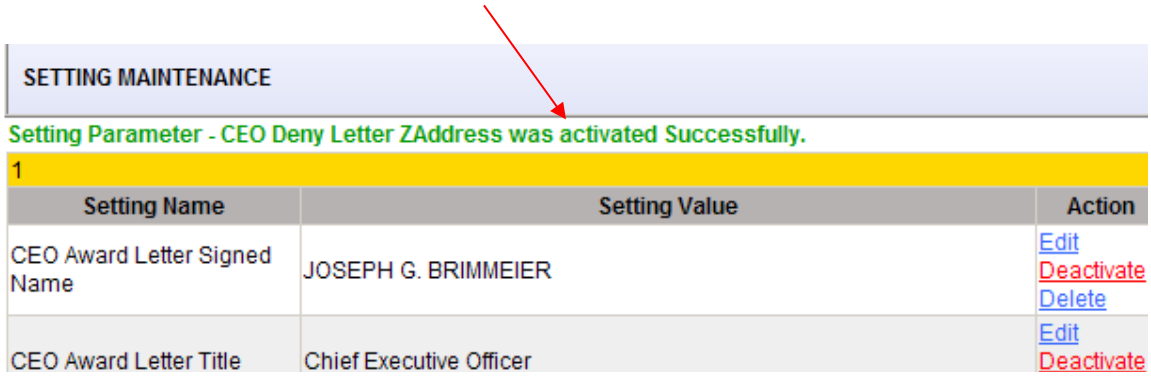


Figure 86 – Confirmation message of successful activation

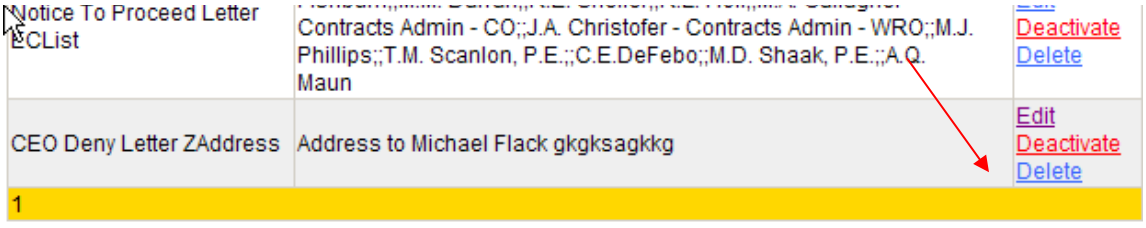


Figure 87 – Delete link

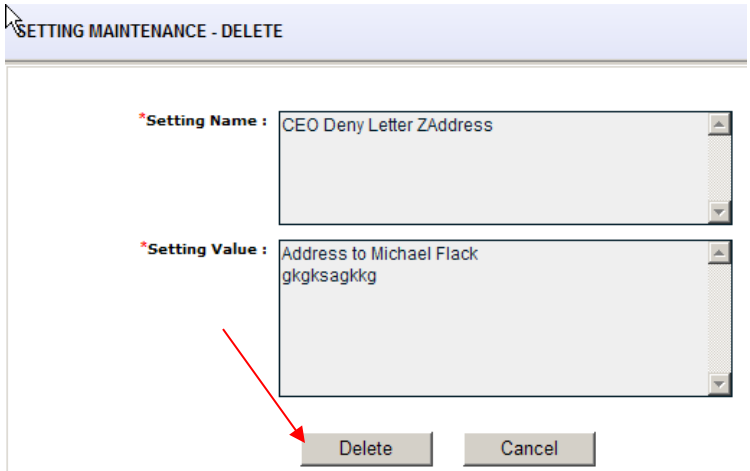


Figure 88 – Delete button

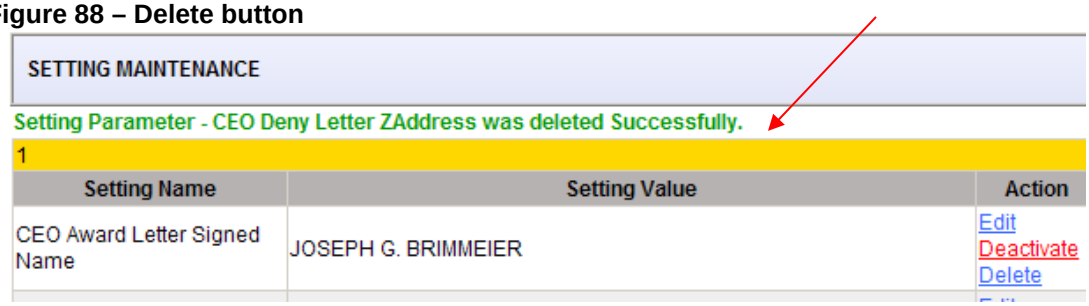


Figure 89 – Confirmation message that deletion was successful

Admin Tool – Application Mode Switch

In order to facilitate the phased rollout of new features in various phases of EBS (Currently Phase 4) this Application Mode switch has been enhanced. The Switch Version in Yellow will only be visible on the Test Server environment. By changing the mode, all the appropriate links, triggers, and emails needed by each version are activated.

- Version 3 – PTC Standards Library /,Project Specific Drawings and Specifications
- Version 3.1 – Online Contract Execution included with above
- Version 4.0 – Routing and Review, Item Price History& Reports, Admin Reporting Module – Current Mode

Procedure:

- Click on the Manage Settings link under the Settings section in the navigation bar (Figure 90, below)
- Scroll down the Setting Name column until you get to **ApplicationMode** (Figure 91)
- Click on the Edit link for an item in the table – **ApplicationMode**
- Click on the pull-down list in Settings Value to indicate which application mode you wish to activate , the click the Update button (Figure 92)

- Click on the Update button (Figure 121)

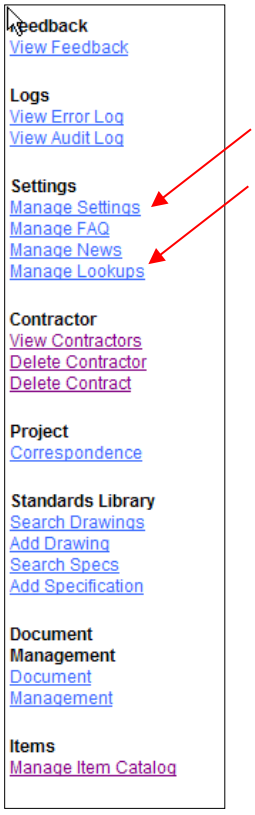


Figure 90 – Manage Settings link, Admin Tool home page

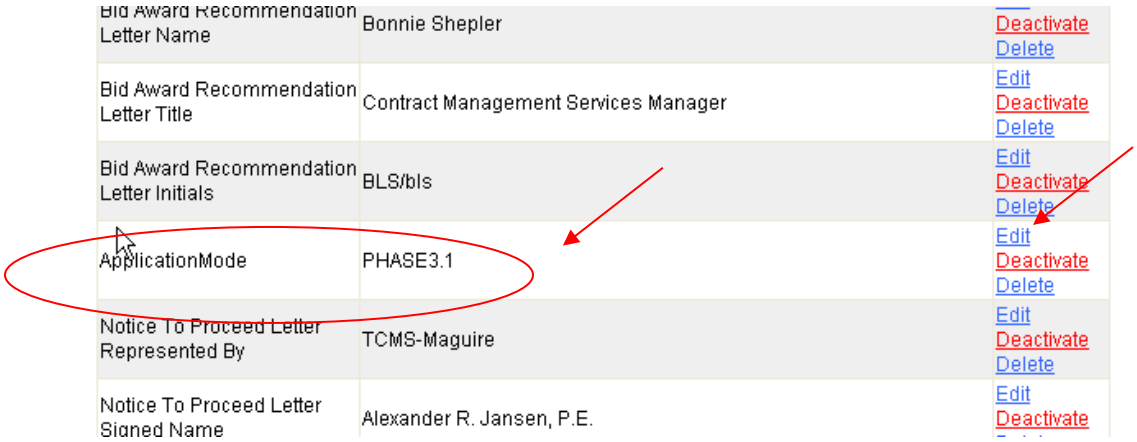


Figure 91 – Application Mode setting, Edit link

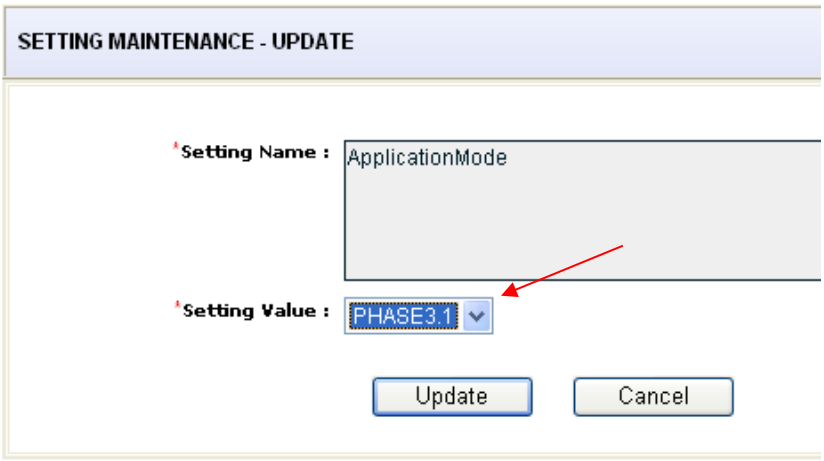


Figure 92 - Settings Value drop down list

Admin Tool – Lookup - request_statuses

This lookup defines status for review requests. Currently there are three: Pending, In Progress, and Completed.

Procedure:

- Click on the Manage Look ups Link under the Settings section in the left Navigation bar (Figure 90, above)
- Select **request_statuses** to administer from drop down list and click on the Display values field box (Figure 93, below)
- Here you may add a new item to the lookup table or edit existing information in the description field

Figure 93 – Lookup table administration – request_statuses

Admin Tool – Lookup - request_types

This new lookup currently contains two active Review Request types: Bid Award and Contract Execution. This lookup allows these types to be edited or de-activated and additional types to be added at a later date, if needed.

Procedure:

- Click on the Manage Lookups Link under the Settings section in the left Navigation bar (Figure 90, above)
- Select Request Types to administer from drop down list and click on the Display values field box (Figure 94, below)
- Here you may add a new item to the Look up Table or edit and update information in the description field for Bid Award and Contract execution (Figure 95)

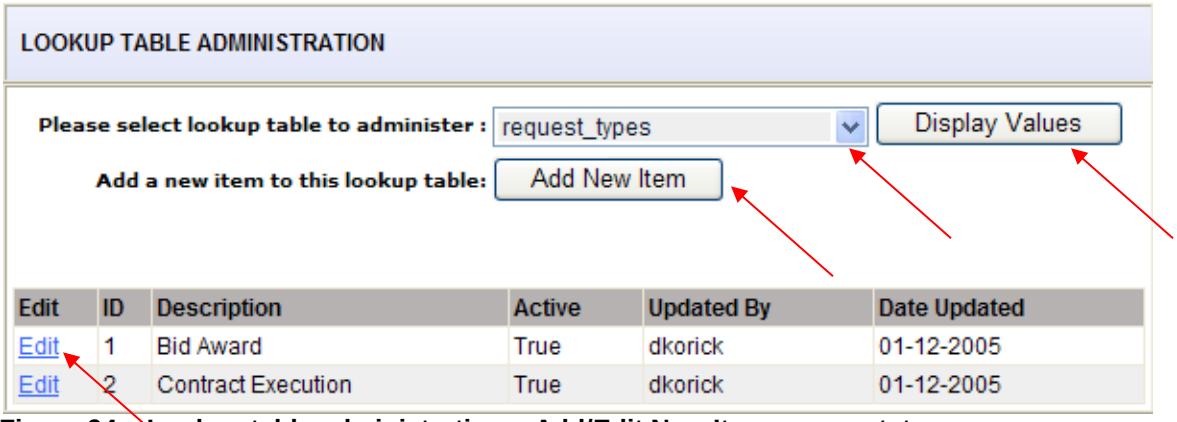


Figure 94 – Lookup table administration – Add/Edit New Item - request_types

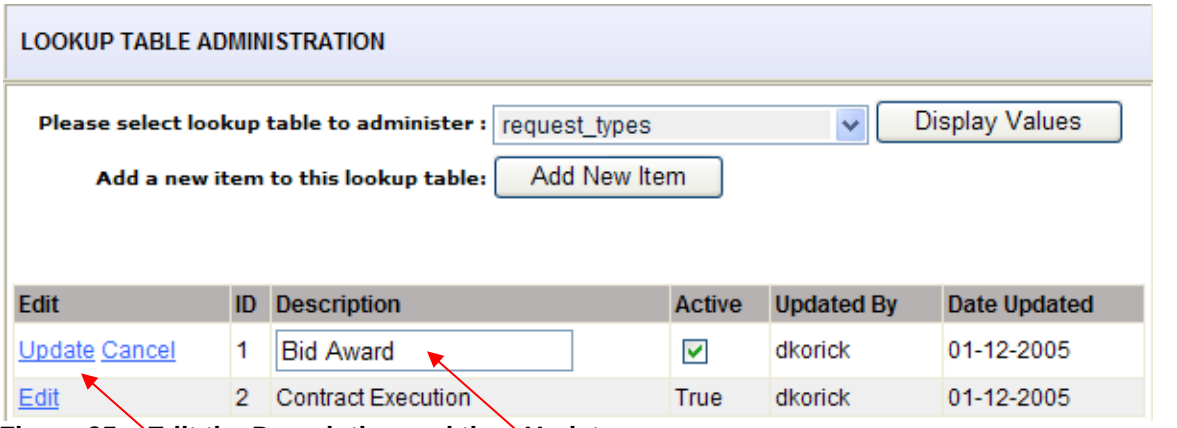


Figure 95 – Edit the Description and then Update

Admin Tool – Lookup - request_type_document_types

There are currently two values for document types: Bid Award and Contract Execution. This lookup allows the current types to be edited and new types to be added.

Procedure:

- Click on the Manage Look ups Link under the Settings section in the left Navigation bar (Figure 90, above)
- Select **request_types_document_types** to administer from drop down list and click on the Display values field box (Figure 96, below)
- Here you may add a new Document Type to the Lookup Table (Figure 96) or Modify and delete existing information for Request Types or Document Types (Figure 97)

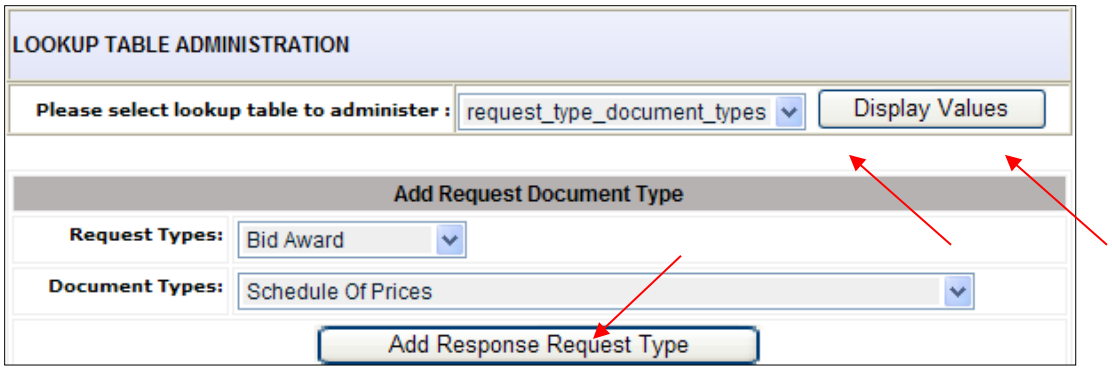


Figure 96 – Add Request Document Type

Modify	Request Type	Document Type	Delete	Updated By	Date Updated
Edit	Bid Award	Schedule Of Prices	Delete	jwingard	04-20-2005
Edit	Bid Award	Contractors Financial Statement	Delete	jwingard	04-20-2005
Edit	Bid Award	Contractors Technical Record	Delete	jwingard	04-20-2005
Edit	Bid Award	Contractors Performance	Delete	jwingard	04-20-2005
Edit	Bid Award	Bidder Certification of Prequalification Classification and Work Capacity	Delete	jwingard	04-20-2005
Edit	Bid Award	Form of Status of Contracts on Hand	Delete	jwingard	04-20-2005
Edit	Bid Award	Bidder Certification	Delete	jwingard	04-20-2005
Edit	Bid Award	MBE WBE Subcontractor and Supplier Solicitation Sheet	Delete	jwingard	04-20-2005
Edit	Bid Award	MBE WBE Subcontractor and Supplier Commitment Sheet	Delete	jwingard	04-20-2005
Edit	Bid Award	Statement of Joint Venture Participation	Delete	jwingard	04-20-2005
Edit	Bid Award	Construction Information Form	Delete	jwingard	04-20-2005
Edit	Bid Award	Work Sheet - Required Amount	Delete	jwingard	04-20-2005
Edit	Bid Award	Work Sheet - Required Amount	Delete	jwingard	04-20-2005
Edit	Bid Award	Temporary DBE Commitment Sheet	Delete	jwingard	04-20-2005
Edit	Bid Award	DBE Attachment A	Delete	jwingard	04-20-2005
Edit	Bid Award	Disclosure Of Lobbying Form	Delete	jwingard	04-20-2005
Edit	Bid Award	Bid Bond	Delete	jwingard	04-20-2005
Edit	Bid Award	Design Consultant Qualification Form and Affidavit	Delete	jwingard	04-20-2005
Edit	Contract Execution	Insurance Certificate	Delete	phwilliams	06-29-2005

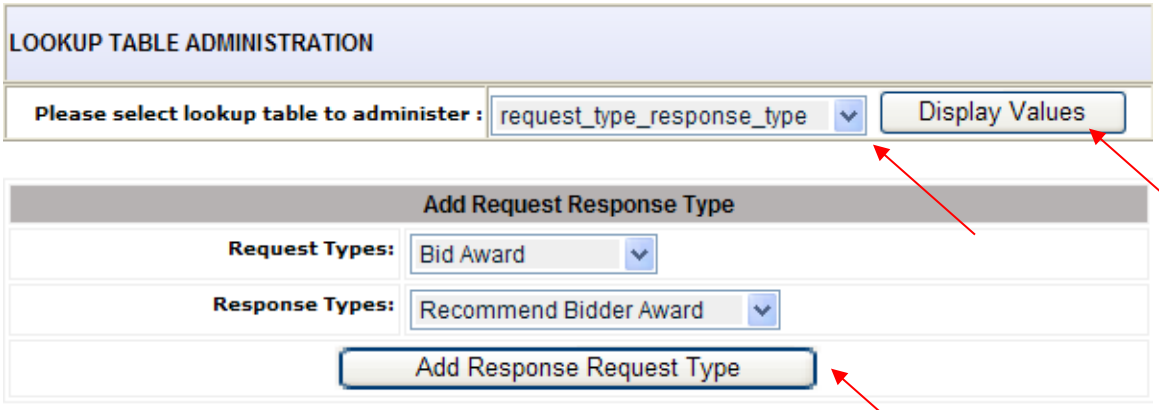
Figure 97 – Edit or delete Request Type

Admin Tool – Lookup - request_type_response_types

This lookup enables adding a response type that a recipient adds to a review, or editing or deleting an existing response type. Currently there are 4 response types for Bid Review and two for Contract Execution

Procedure:

- Click on the Manage Lookups Link under the Settings section in the left Navigation bar (Figure 90, above)
- Select **request_types_response_type** to administer from drop down list and click on the Display values field box (Figure 98, below)
- Here you may add a new **request_types_response_type** to the lookup table or edit or delete existing information for Request Types or Document Types (Figure 99)



Modify	Request Type	Response Type	Delete	Updated By	Date Updated
Edit	Bid Award	Recommend Bidder Award	Delete	jwingard	04-19-2005
Edit	Bid Award	Recommend Bidder Rejection	Delete	jwingard	04-19-2005
Edit	Bid Award	Bidder Acceptable	Delete	jwingard	04-19-2005
Edit	Bid Award	Bidder Not Acceptable	Delete	jwingard	04-19-2005
Edit	Contract Execution	Approve Contract	Delete	phwilliams	06-15-2005
Edit	Contract Execution	Reject Contract	Delete	phwilliams	06-15-2005

Figure 98 – Add or edit request response type actions

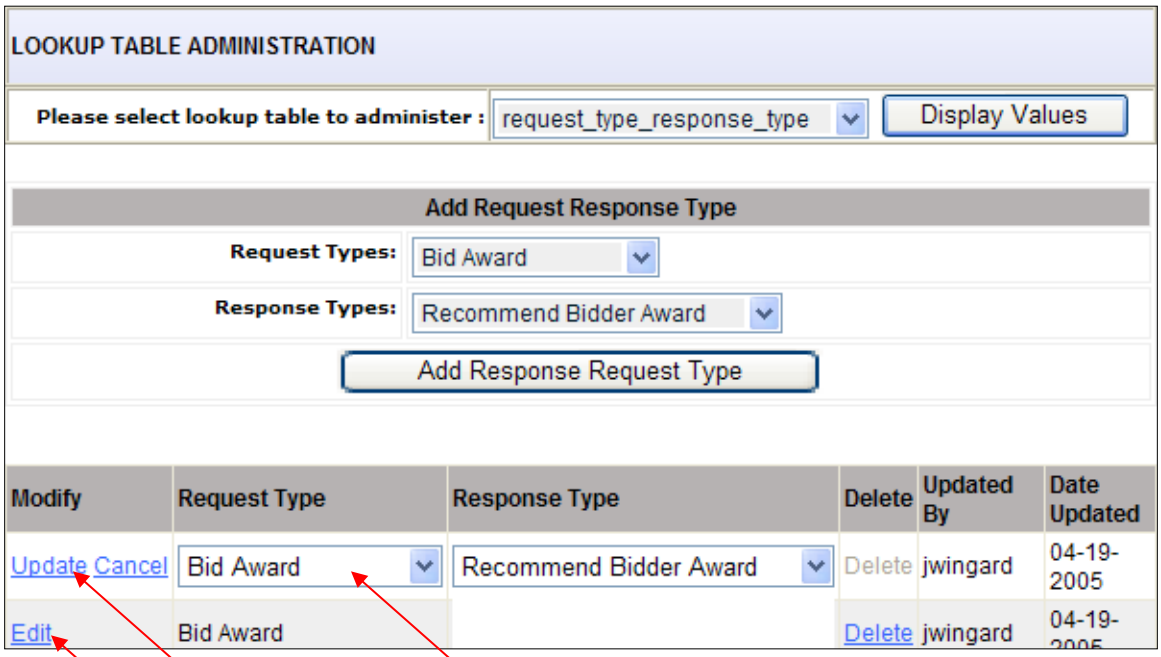


Figure 99 – Edit, update, delete Request Type options

Admin Tool – Lookup - response_types

This area enables the functionality to add a response type or edit a response type. This is just a list and does not associate the type with the request type. Again, there are four response types for Bid award and two response types for Contract execution

Procedure:

- Click on the Manage Lookups Link under the Settings section in the left Navigation bar (Figure 90, above)
- Select **response_types** to administer from drop down list and click on the Display values field box (Figure 100, below)
- Here you may add a new Response Type to the Look up Table or edit existing information for Bid award or Contract Execution
- You may also deactivate a lookup table

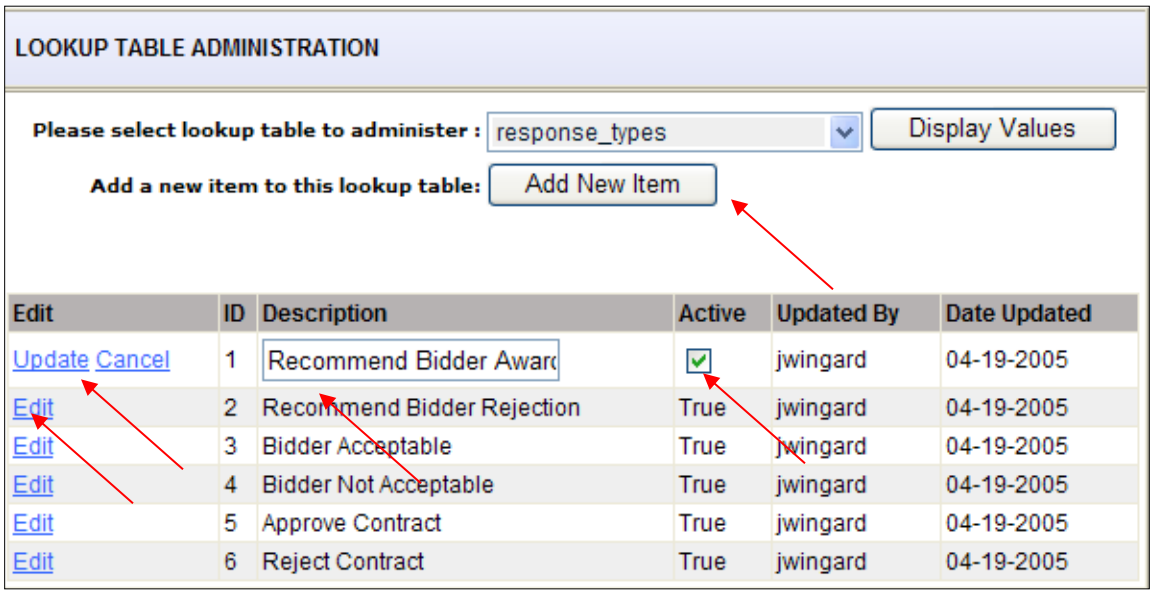


Figure 100 – Response_types add, edit, delete and activate options

Admin Tool – Lookup - review_list_types

This lookup defines the two types of Reviews currently active in the system – Route Slip and Distribution List. A Route Slip is routed sequentially; a distribution list goes to everyone all at once.

Procedure:

- Click on the Manage Lookups Link under the Settings section in the left Navigation bar (Figure 90, above)
- Select Review List Types to administer from drop down list and click on the Display values field box (Figure 101, below)
- This area enables the functionality to add a new type of review list to the review_list_types lookup table or edit the description for Route Slip and Distribution list (Figure 102)
- If need be the types of review may also be deactivated on this screen

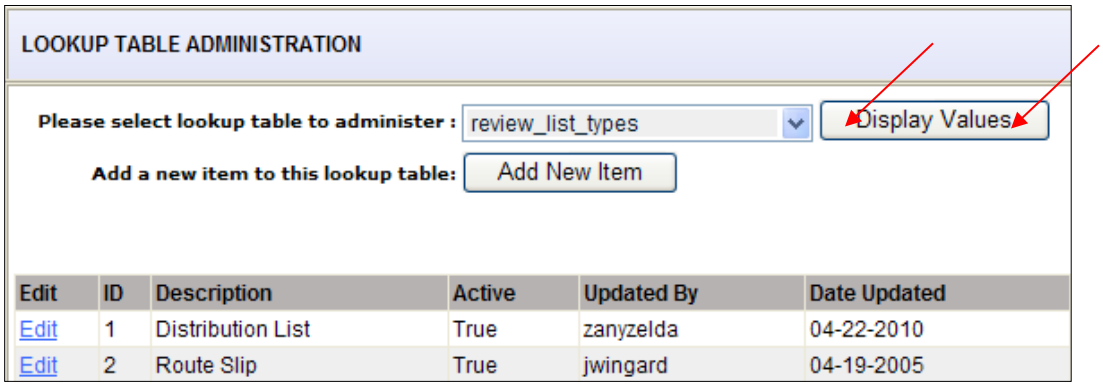


Figure 101 – Review_list_types select and display

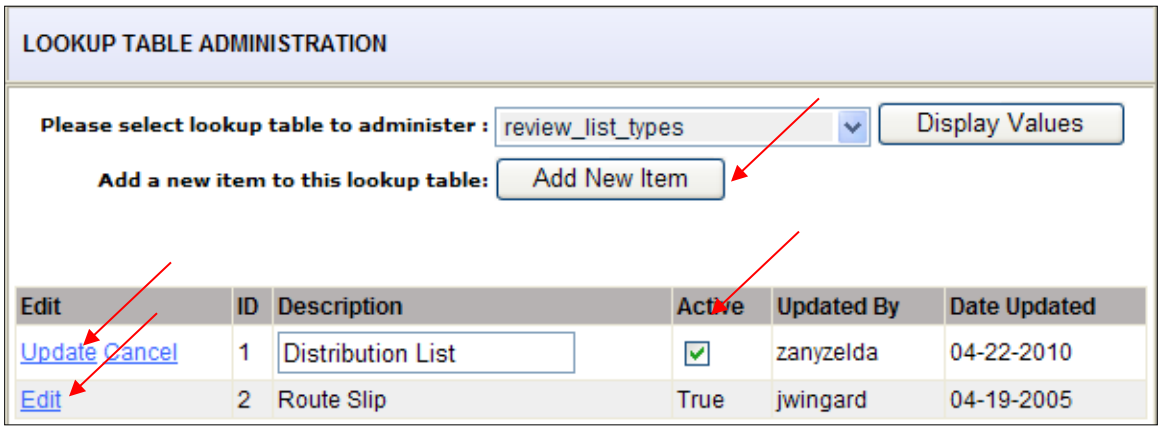


Figure 102 – Add, edit and update item in review_list_types lookup table

Admin Tool – Lookup - request_statuses

This lookup defines status for review requests. Currently there are three: Pending, In Progress, and Completed.

Procedure:

- Click on the Manage Lookups Link under the Settings section in the left Navigation bar (Figure 90, above)
- Select Request Statuses to administer from drop down list and click on the Display values field box (Figure 103, below)
- This area enables the functionality to add a new item to Lookup table or edit the description for the three Request Statuses: Pending, In Progress, Completed (Figure 104)
- If need be any or all of the three types of review may also be deactivated.

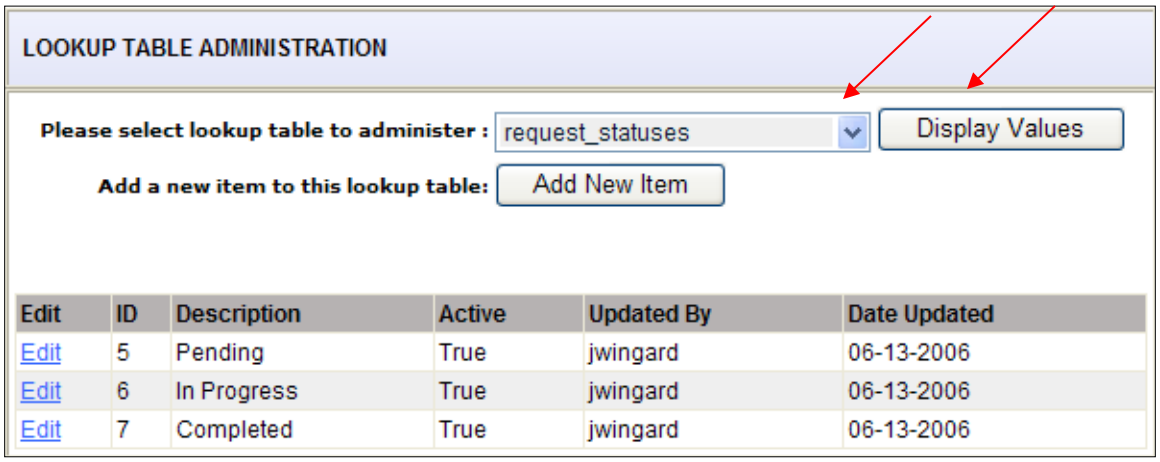


Figure 103 – Select request_statuses, Display Values

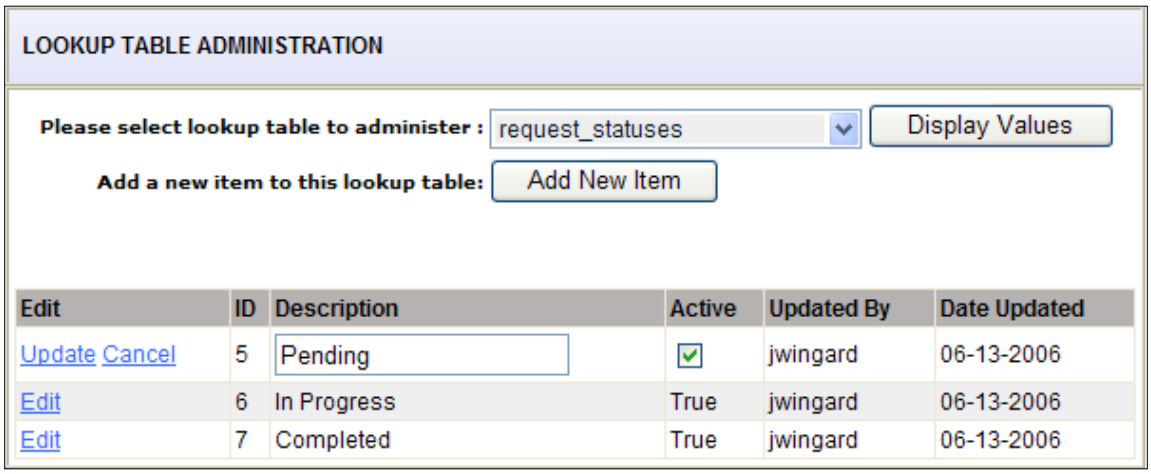


Figure 104 – Add, edit and update item in request_stauses lookup table

Admin Tool – Lookup - users_review_cc

This lookup allows the PTC Contract manager or developer to attach a cc (carbon copy) or multiple CCs to a PTC reviewer The CC may act as proxy to respond to a Route List or Distribution List Review Request, in place of the original reviewer.

Procedure:

- Click on the Manage Lookups Link under the Settings section in the left Navigation bar (Figure 90, above)
- Select **users_review_cc** to administer from drop down list and click on the Display values field box (Figure 105, below)
- Select Reviewer from drop down list (Figure 106)
- Select a CC from drop down list
- Click on the Active check box to activate the new CC
- Click on the Add CC field box

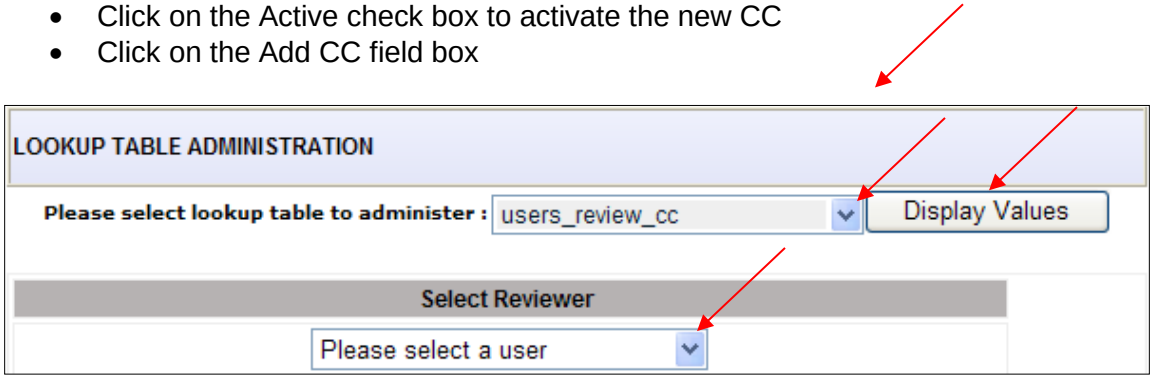


Figure 105 – Select users_review_ cc table, Display Values and Select a Reviewer

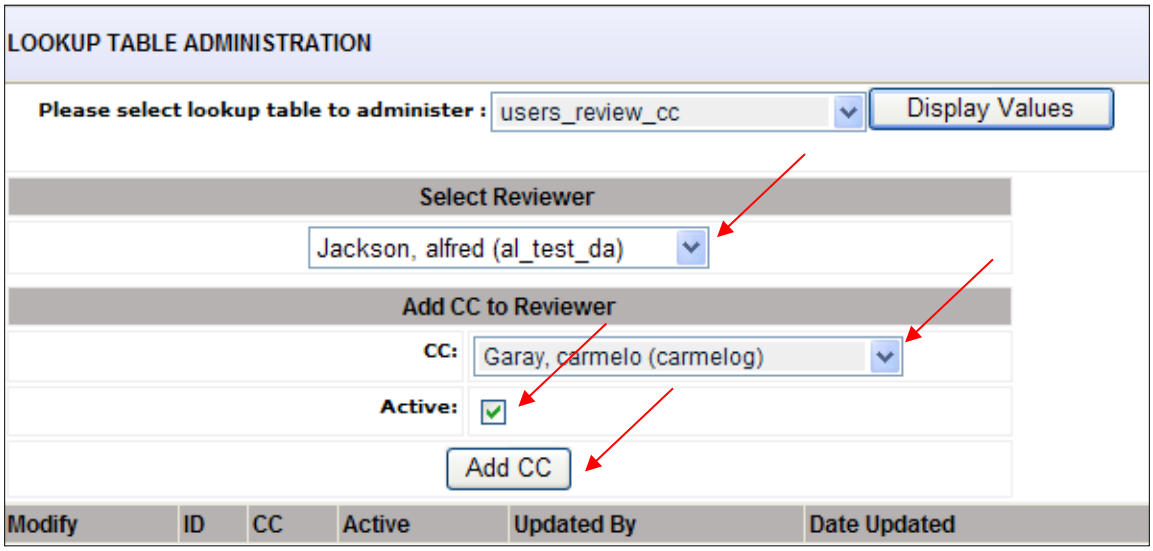


Figure 106 – Add CC to Reviewer process

Chapter 6 Contractors

Admin Tool - View Contractor Users; Reset Password

Procedure:

- Click on the View Contractors link under the Contractor section in the navigation bar (Figure 107, below)
- Select the name of a contractor from the drop-down list and click on the View Company Profile button to view registration information for the contractor (Figure 108, below)
- Contractor's profile screen (Figure 109)
- Click on the User Search link at the top left, enter one or more criteria (such as User Id), and click on the Search Users button to find the list of matching users for the contractor (Figures 110,111)
- Click on the Reset Password link to reset the password for a user (Figure 112)
- Enter a new email address twice, then click on the Change Email button to change the email address for a user (or click on the Cancel button to return without making changes)(Figure 114)
- Receive confirmation that the password was changed (Figure 115)

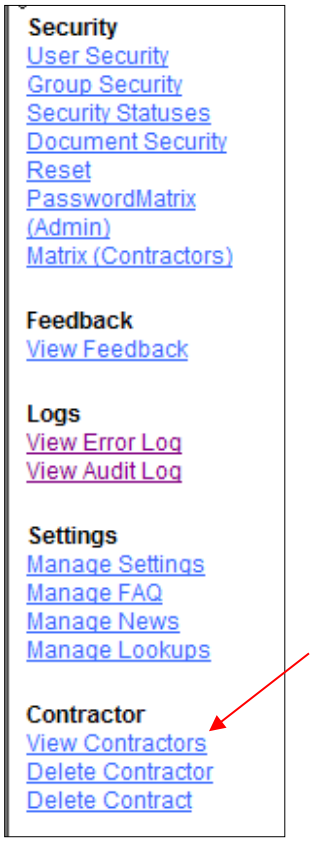


Figure 107 – View Contractors link

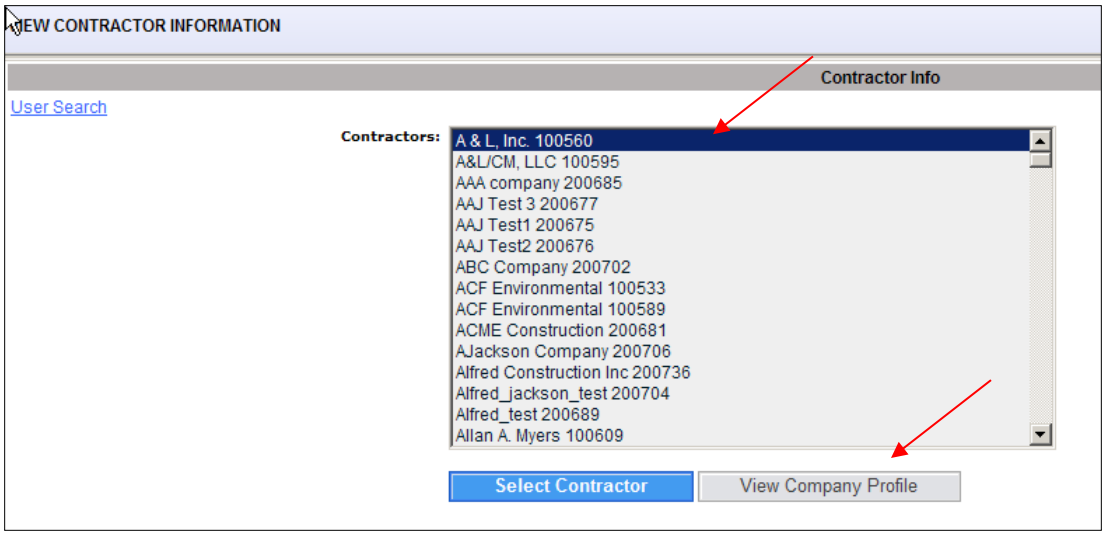


Figure 108 – Contractors listed in Alphabetical order

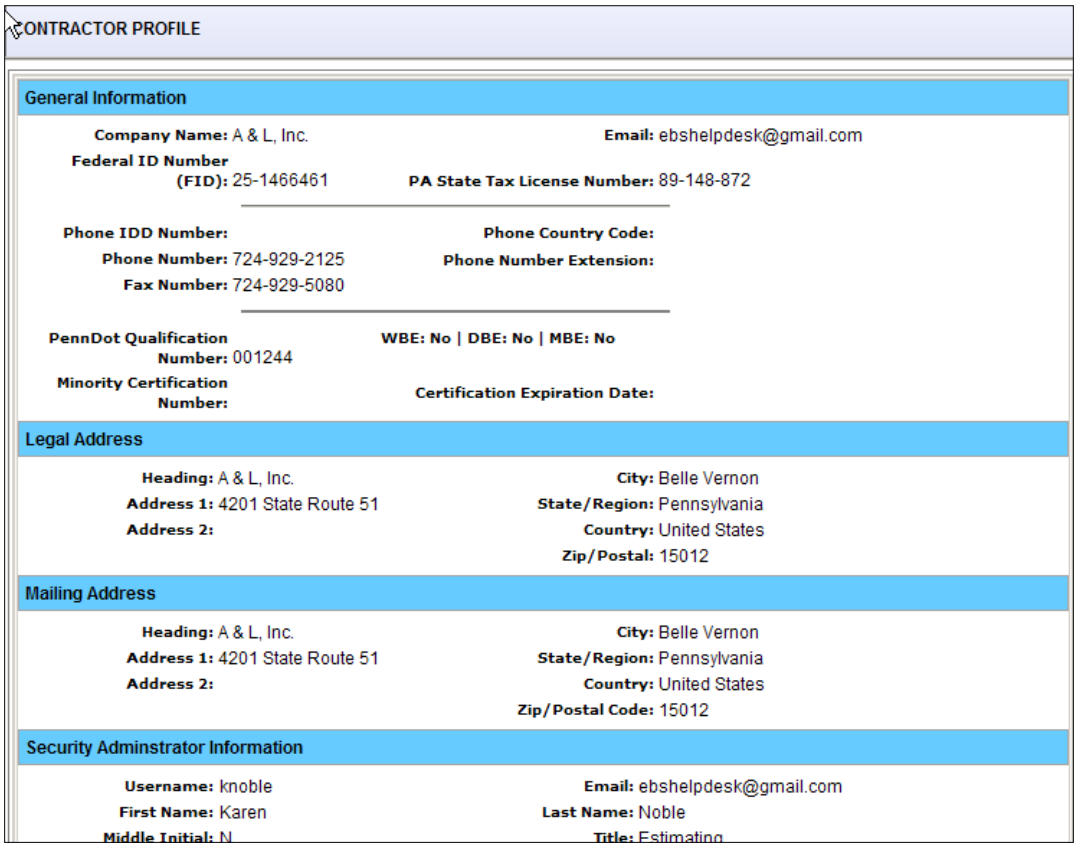


Figure 109 – Example of Contractor (Business Partner) profile

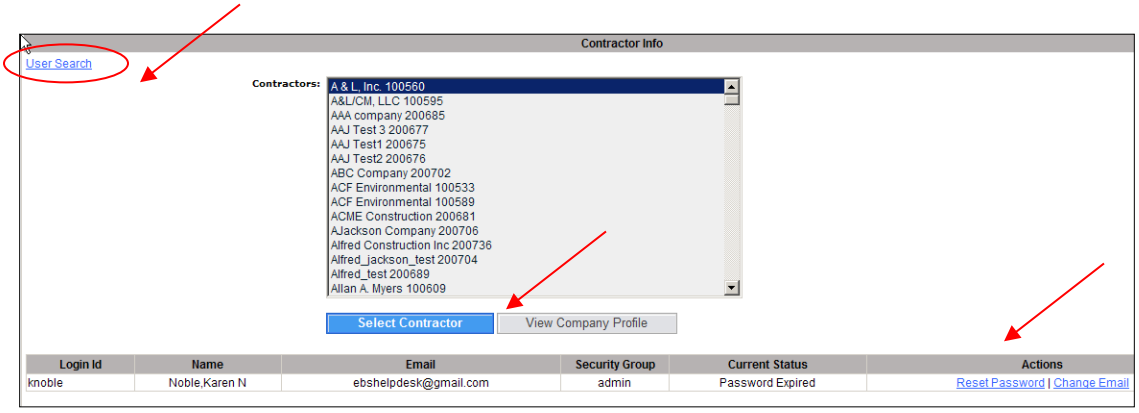


Figure 110 – User Search link and results

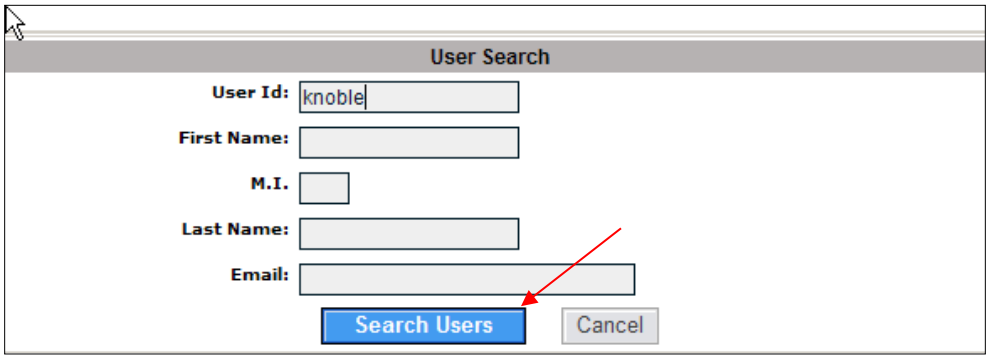


Figure 111 – User Search window' Search users button

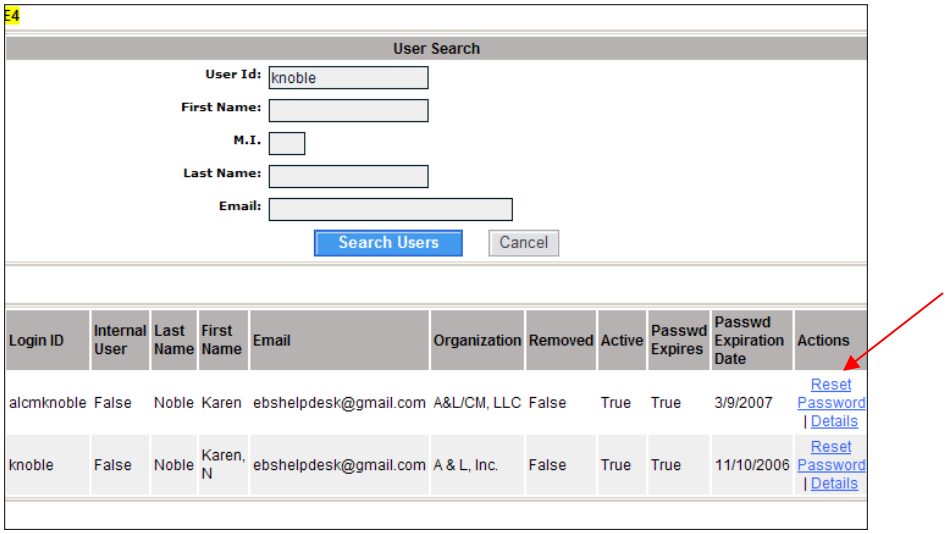


Figure 112 – Actions that can be performed for individual users

*denotes required field
Reset Password
*Username: alcmknoble
Note: Resetting the user's password will automatically send an email to the user with their new password.
Reset Password

Figure 113 – Reset Password button

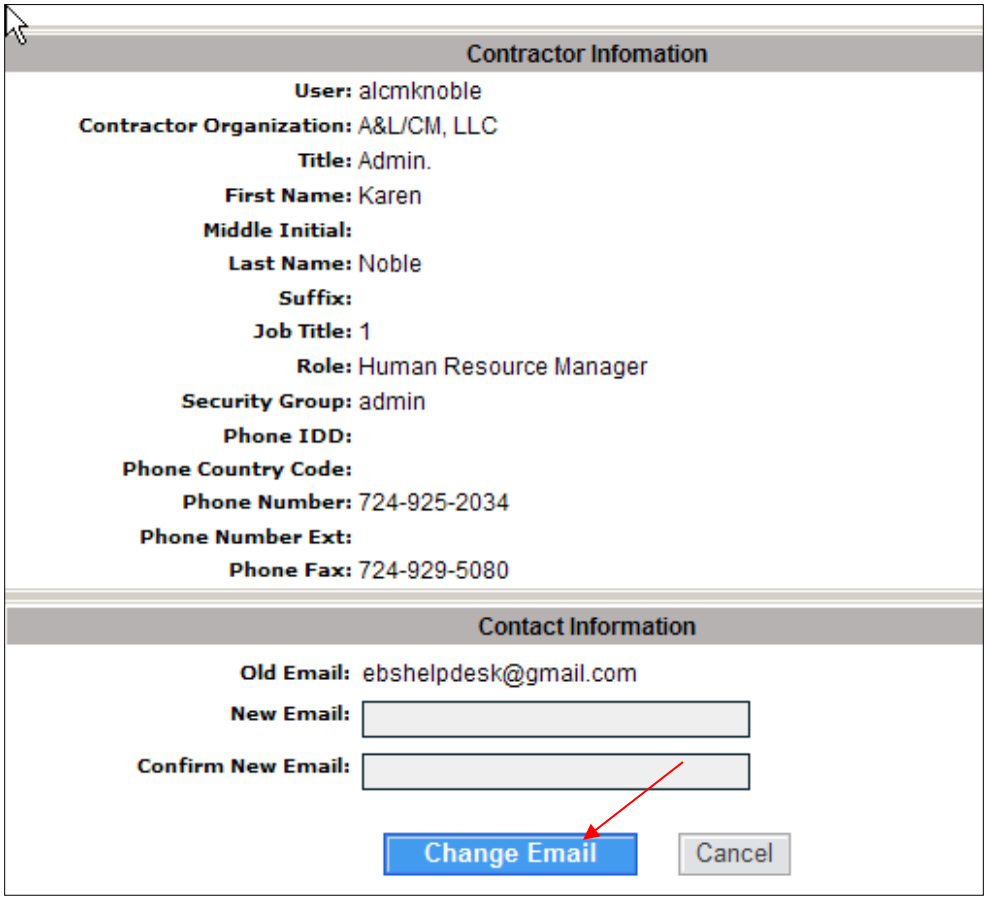


Figure 114 – Change Email button

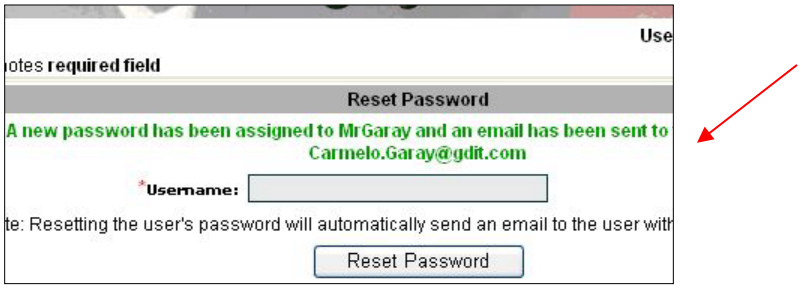

Use
otes required field
Reset Password
A new password has been assigned to MrGaray and an email has been sent to Carmelo.Garay@gdit.com
*Username:
te: Resetting the user's password will automatically send an email to the user with
Reset Password

Figure 115 – Confirmation that new passowrd has been assigned

Admin Tool - Delete Contractor

Procedure:

- Click on the Delete Contractor link under the Contractor section in the navigation bar (Figure 116, below)
- Select a contractor ID for a contractor in the list (Figure 117)
- Click on the Delete Contractor button (Figure 118)
- Click on the Yes button to remove all data for the selected contract from the database or click on the No button to return to the previous page without deleting the contract (Figure 119)
- Confirmation that the Contractor has been deleted (Figure 121)

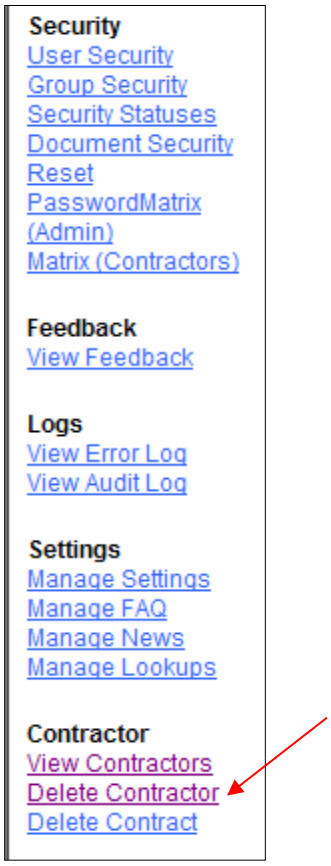


Figure 116 – Delete Contracttor link

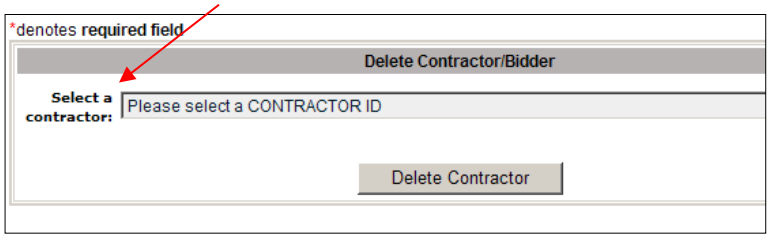


Figure 117 – Select a contractor ID

Figure 118 – Delete button

This action is not reversable.
Are you sure you wish to delete contractor Scrappy Doo Construction - 200711 (Registration Approved) ?
Yes
No

Figure 119 – Warning message; then click Yes or No button

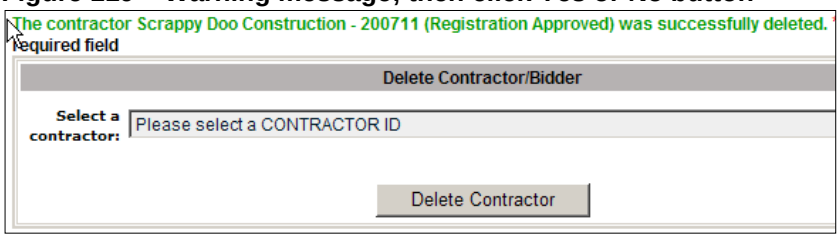

The contractor Scrappy Doo Construction - 200711 (Registration Approved) was successfully deleted.
required field
Delete Contractor/Bidder
Select a contractor:
Please select a CONTRACTOR ID
Delete Contractor

Figure 120 – Confirmation of contractor deletion message

Admin Tool - Delete Contract

Procedure:

- Click on the Delete Contract link under the Contractor section in the navigation bar (Figure 121, below)
- Select a contract number for a contract in the list (Figure 122)
- Optionally, click on the Delete Documents checkbox to permanently remove all document files associated with the deleted contract
- Click on the Delete Contract button
- Click on the Yes button to remove all data for the selected contract from the database or click on the No button to return to the previous page without deleting the contract (Figure 123)
- Confirmation that the contract has been deleted will appear (Figure 124)

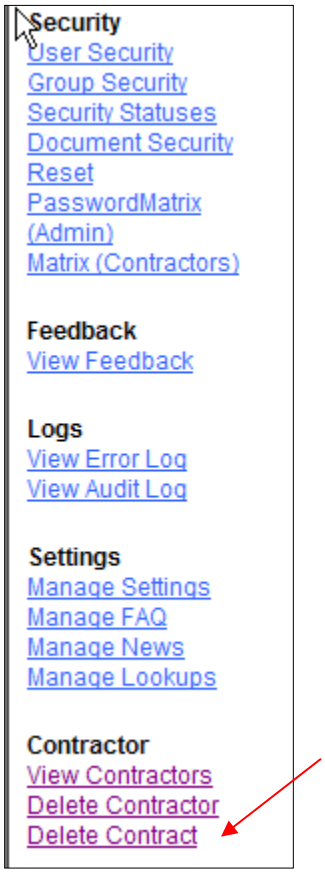


Figure 121 – Delete Contract link

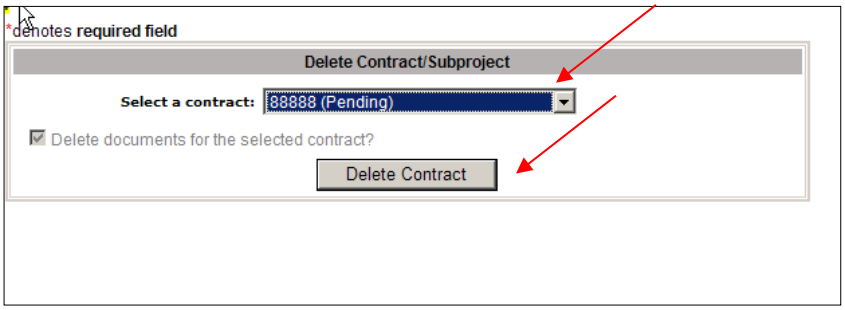


Figure 122 – Select Contract; Delete button

Figure 123 - Warning message, Yes or No buttons

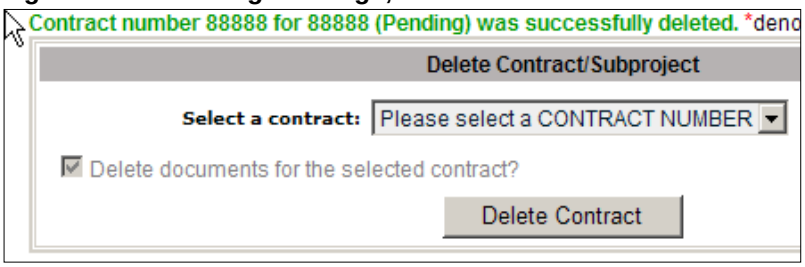

Contract number 88888 for 88888 (Pending) was successfully deleted. *dend
Delete Contract/Subproject
Select a contract:
Please select a CONTRACT NUMBER
Delete documents for the selected contract?
Delete Contract

Figure 124 – Contract deletion confirmation message

Chapter 7 Project Correspondence

Lookup Table – Letter_Types

This Lookup table is used to store every letter and notice type that is used during the contract execution process, including emails.

Procedure:

- Click on the Manage Lookups Link under the Settings section in the left Navigation bar (Figure 125, below)
- Click on the Drop Down box under Lookup Table Administration and select **Letter _Types** and then click on display values
- As PTC Admin you can add a new item to the Lookup Table by clicking on the Add New Item Field, enter new information for the description, select the Active box, click on save
- If necessary, you have the option to edit the table **Letter_Types** information by clicking the Edit link to update the Description and select the box with a check to make Active or inactive.

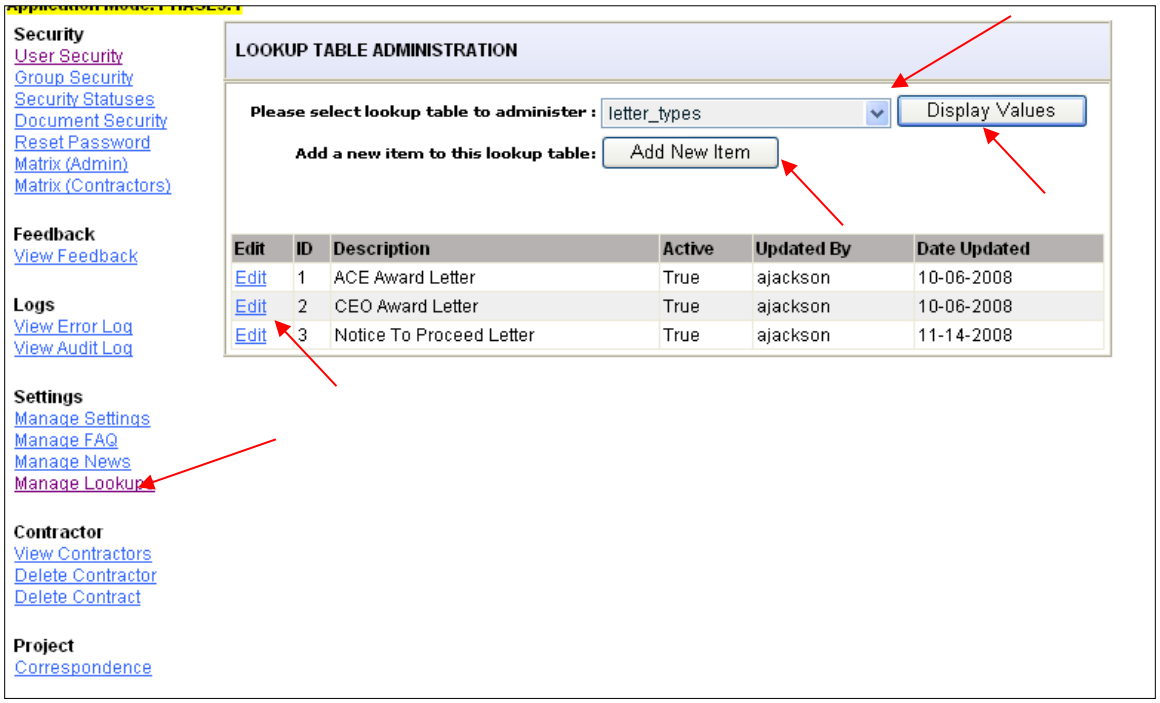


Figure 125 – Manage Lookups

Lookup Table - Letter_Contacts

This Lookup table is used to store contracts for every letter and notice that is used during the contract execution process.

Procedure:

- Click on the Manage Lookups Link under the Settings section in the left Navigation bar (Figure 125, above)
- Click on the Drop Down window under Lookup Table Administration and select table **Letter _Contacts** and then click on display values (Figure 126, below)
- To enter a new letter contact you may enter a title in the Title Field but it is not required however the First Name, Last Name, Email address are all required fields. Select the Active box and click on the Add Contact field box
- Once a Letter contact has been created you can edit or modify information by clicking the edit link and updating the Title, Last Name, First Name, Email Address, selecting the Active box or deselecting to make Inactive

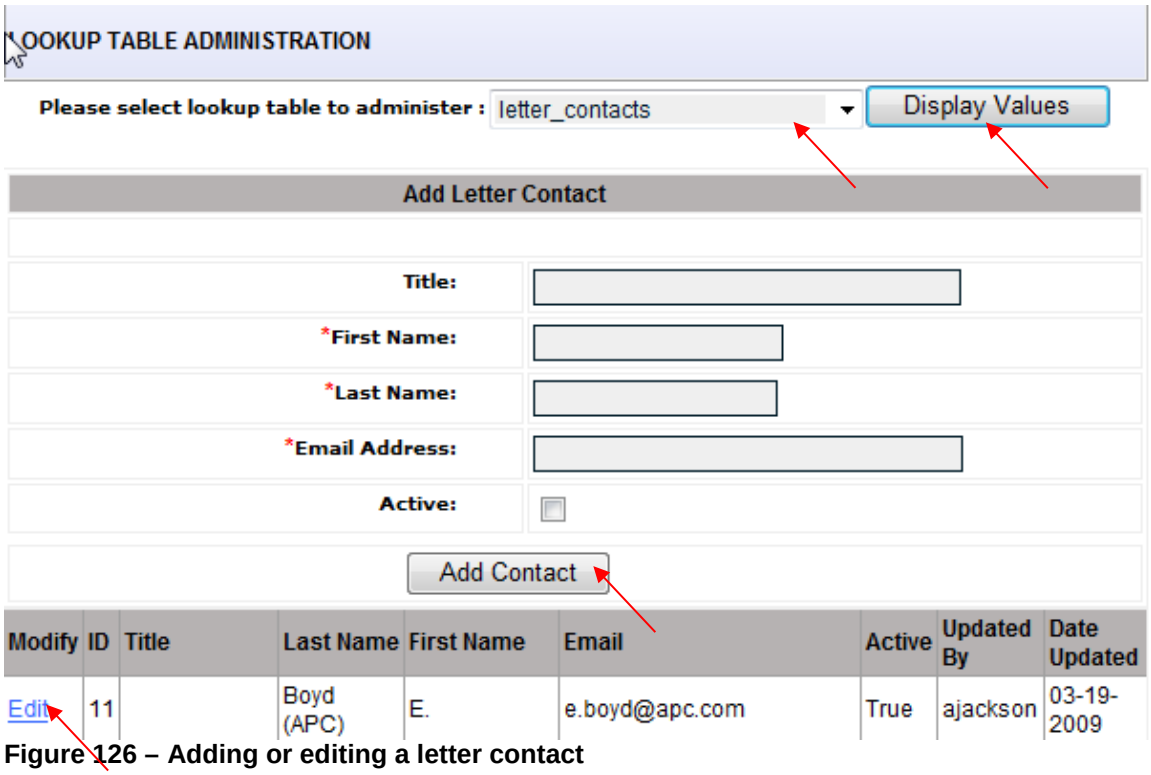


Figure 126 – Adding or editing a letter contact

Lookup Table - Letter_Types_Contacts

This Lookup table is the intersection table between the **Letter_Contacts** and the **Letter_Types** tables. It is used to assign a contact to a letter type.

Procedure:

- Click on the Manage Lookups Link under the Settings section in the left Navigation bar (Figure 127, below)
- Click on the Drop Down window under Lookup Table Administration and select Table **Letter_ Types_Contacts** and then click on the Display Values button
- Select a Contact from the pull down list; select a letter type from the pull down list, select a box or boxes that apply: Carbon copy, Electronic Copy, Default Contact, Active, click on the Add Letter Field
- Once the Letter_Types_Contacts has been added, you can edit information by clicking on the edit link

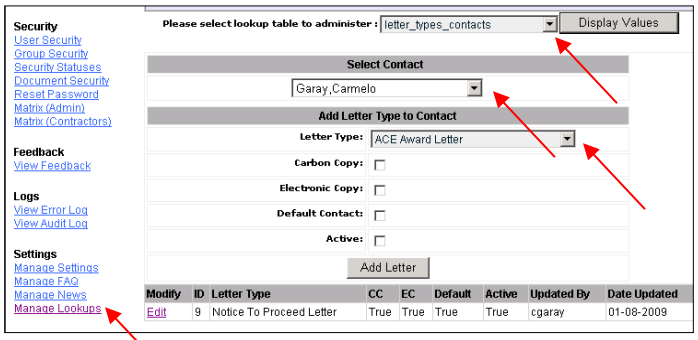


Figure 127 – Manage Contacts and Letter Types

Admin Tool – Correspondence Folder

This folder is used to store contract execution correspondence files that are auto-generated and sent out automatically by the EBS system.. These files include the Ace Award Letter, CEO Award Letter, contractor upload emails, contractor rejection emails, Notice to Proceed Letters, etc. It can be used as a correspondence trail for audit purposes.

Procedure:

- Click on the Correspondence Link under the Projects section in the left Navigation bar of the Admin Tool home page (Figure 128, below)
- Select a Contract number from pull down list and click on the View Correspondence field box (Figure 129)
- You are able to select and download the contract correspondence files that are needed by clicking on the download correspondence link

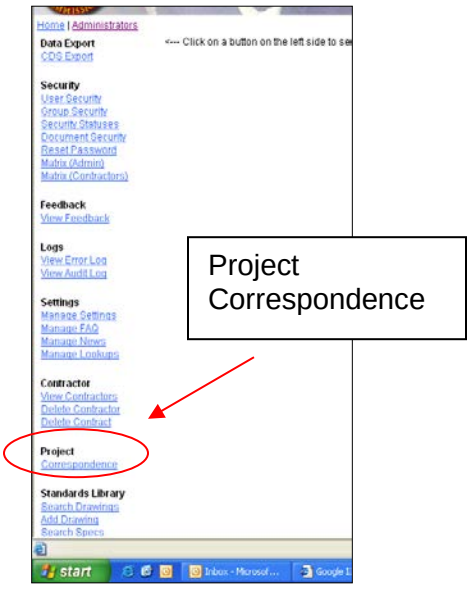


Figure 128 - Correpsondence link

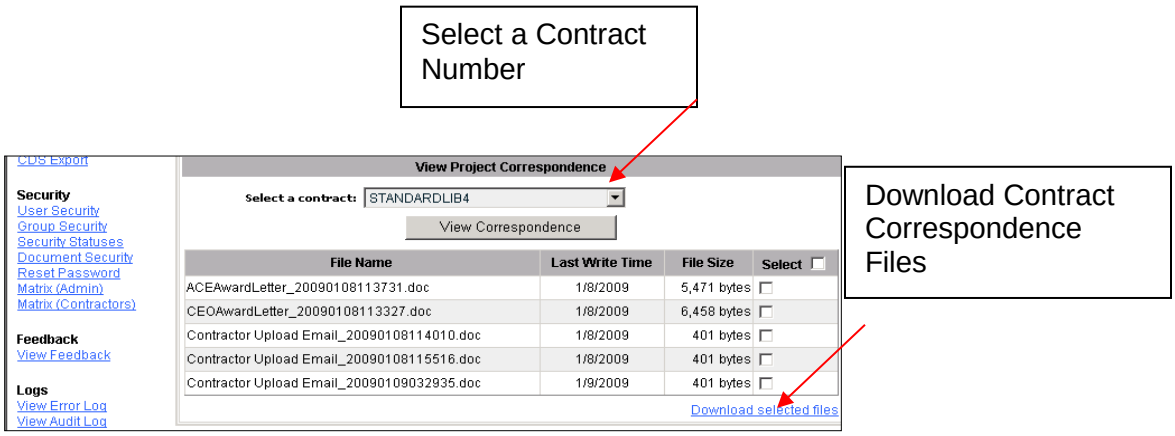


Figure 129 – Select a contract; download contract correspondence files link

Chapter 8 Standards Library

Admin Tool - View Commission Specifications

Procedure:

- Click on the Search Specs link under the Standards Library section in the navigation bar (Figure 130, below)
- Enter one or more criteria including: Year, Change Number, Type (or Types), and/or Section (Figure 131)
- Click on the Search button (Figure 132)
- Click on the Document name link to view the drawing (Figures 132,133)

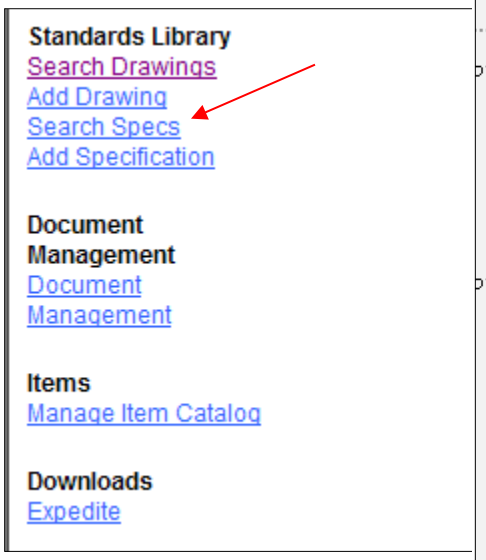


Figure 130 – Search Specs link

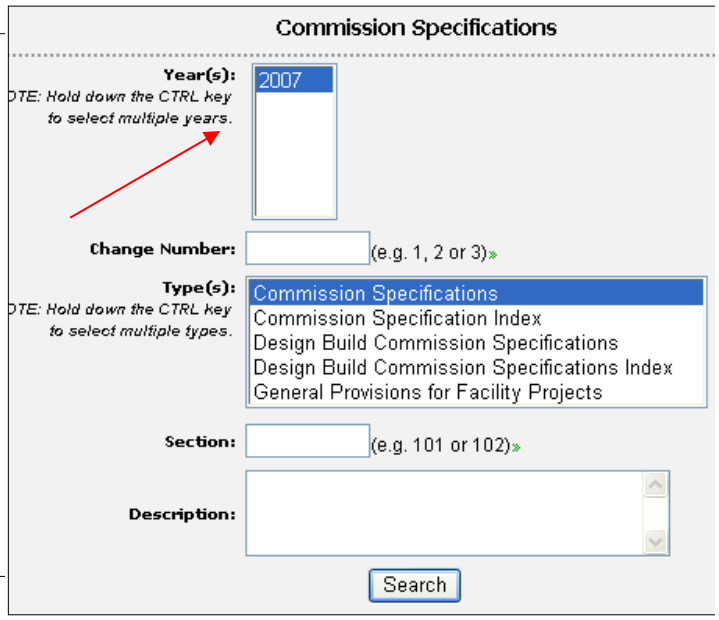


Figure 131 – Commission Specification fields

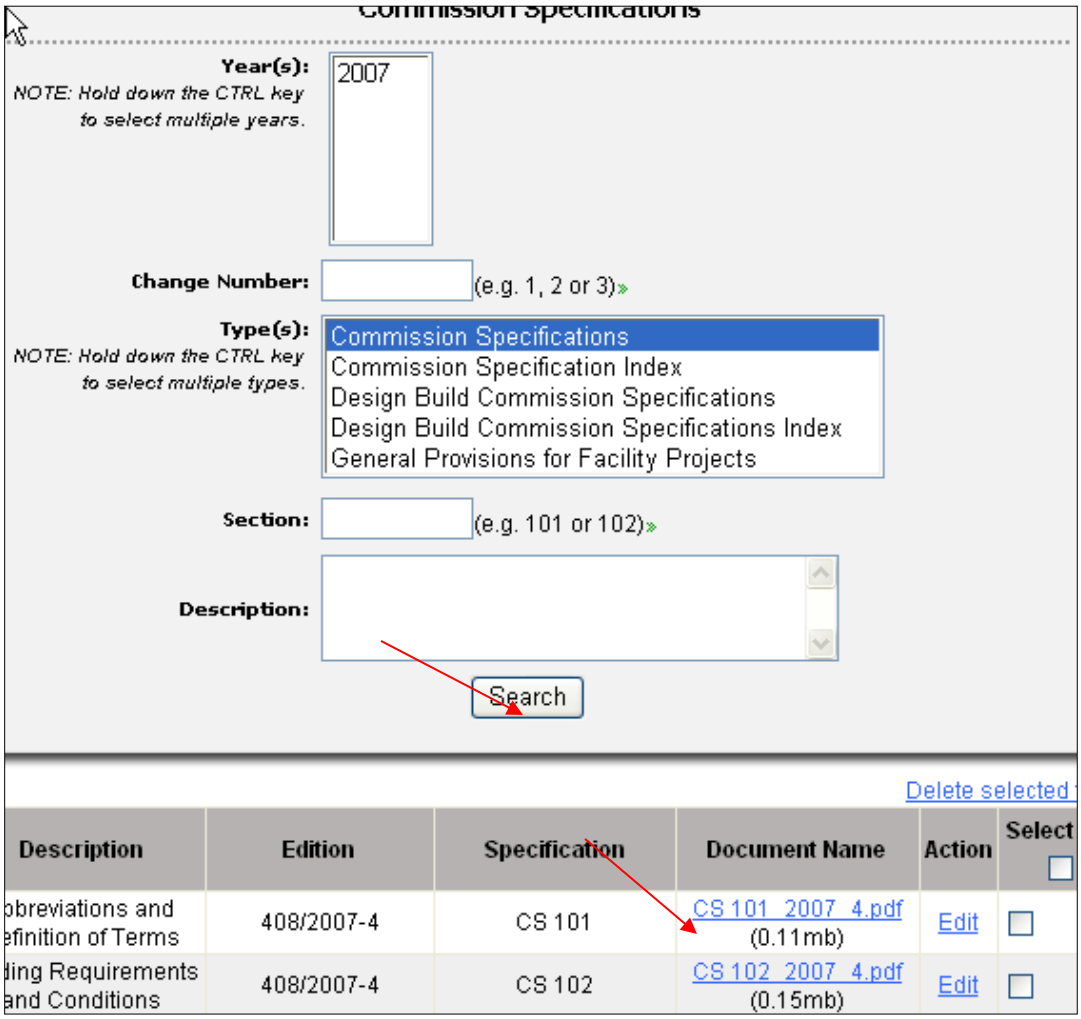


Figure 132 – Commission specification search and search results

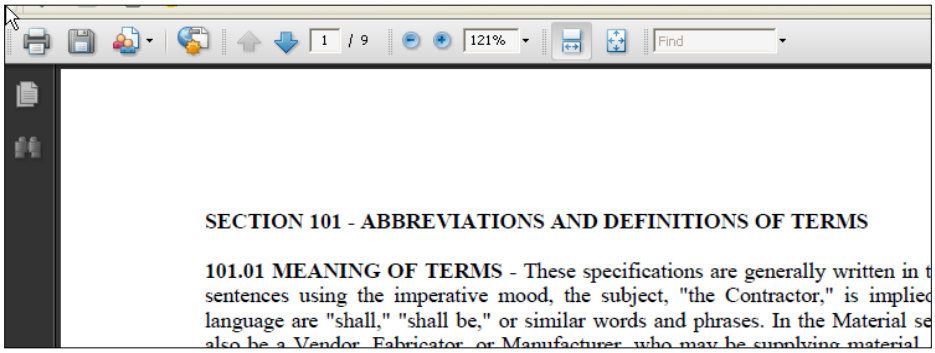

1 / 9
121%
Find
SECTION 101 - ABBREVIATIONS AND DEFINITIONS OF TERMS
101.01 MEANING OF TERMS - These specifications are generally written in t
sentences using the imperative mood, the subject, "the Contractor," is implied
language are "shall," "shall be," or similar words and phrases. In the Material se

Figure 133 – Example of an specification in PDF format

Admin Tool - View Standard Drawings

Procedure

- Click on the Search Drawings link under the Standards Library section in the navigation bar (Figure 134, below)
- Enter one or more criteria including: Type (or Types), PTC Series Number, Edition and/or Sheet Number (Figure 135)
- Click on the Search button
- Click on the link in the Document name column of the search results (Figure 136)
- View Drawing (Figure 137)

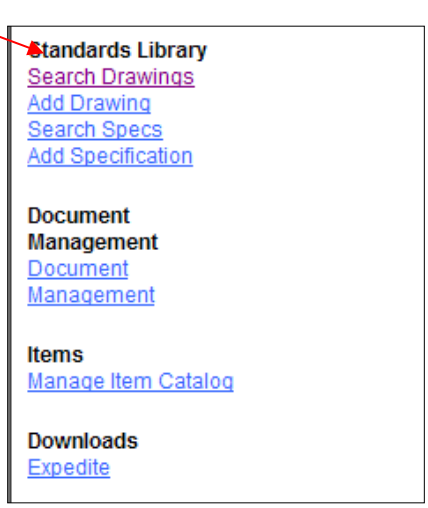


Figure 134 - Search Drawings link

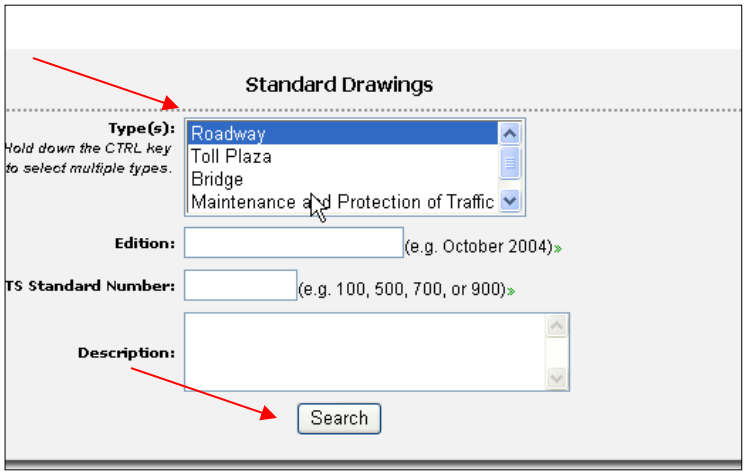


Figure 135 – Standard Drawings search criteria

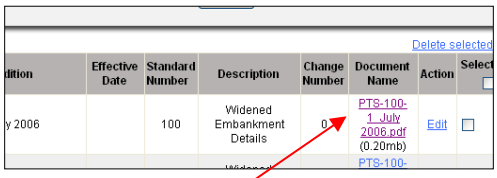


Figure 136 – Seach results; click on Document name link to opne

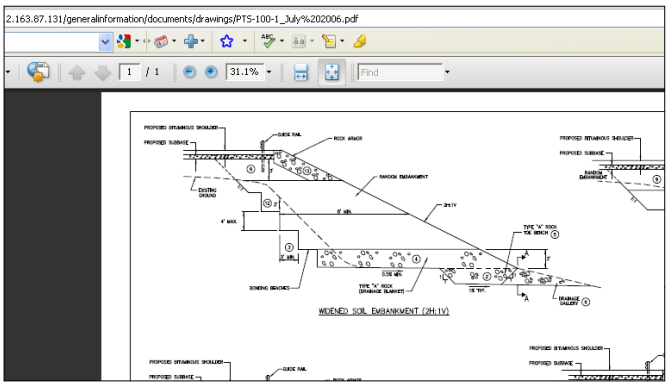


Figure 137 – Example of Commission Standard Drawing

Admin Tool - Add Commission Standard Specification

Procedure:

- Click on the Add Specification link under the Standards Library section in the navigation bar (Figure 138, below)
- Enter the year - which is a required data field (Figure 139)
- Optionally, enter a value in the Change Number field: (e.g. 1, 2 or 3) Or leave blank for base year

NOTE: Put in Month and Year for the Specification Index only - No need to enter the description field

- Click on the Browse button and select the Commission Specification document file located on your computer. (.pdf, .zip) (Figure 140)
- Click on the Upload button (Figure 141)

NOTE : This feature is supported by the **Standard_specification_desc** lookup table detailed later in this chapter. As new Standard Specifications are issued and become available, do not add a new Standard Specification until its new description has also been added in the lookup table.

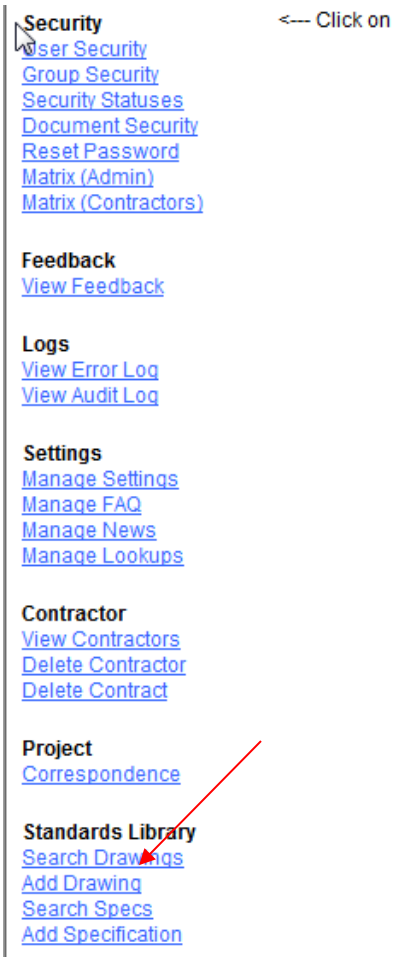


Figure 138 – Add Specification link

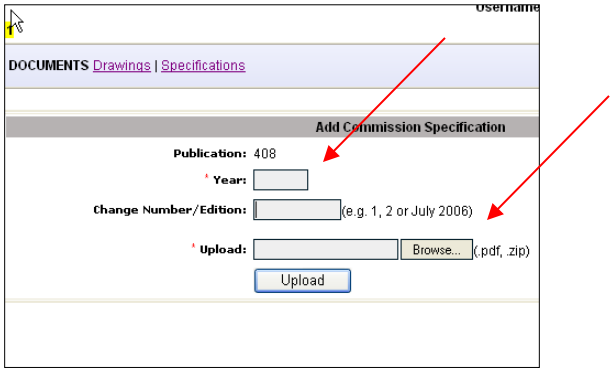


Figure 139 – Identify the Specification to be uploaded and browse to find it

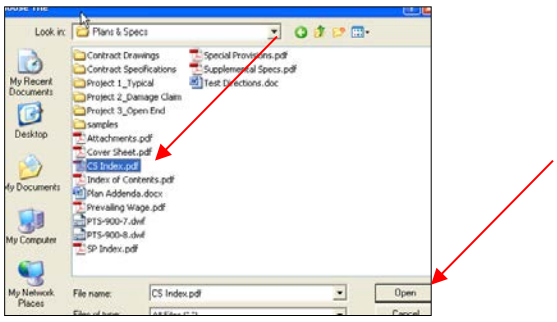


Figure 140 – Once located, then highlight and clik the Open button

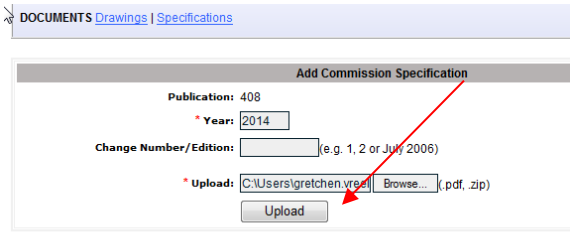


Figure 141 – Upload button

Admin Tool - Add Commission Standard Drawing

Procedure:

- Click on the Add Drawing link under the Standards Library section in the navigation bar (Figure 142, below)
- Enter the following required data fields: Edition, Effective date (if applicable) then upload (Figure 143)
- Click on the Browse button and select the Standard Drawing document file located on your computer (.dwf, .pdf, .zip) (Figure 143)
- Click on the Upload button

NOTE: This feature is supported by the **standard_drawing_desc** lookup table detailed later in this chapter. As new Standard Drawings are issued and become available, do not add a new Standard Drawing until its new description has also been added in the lookup table.

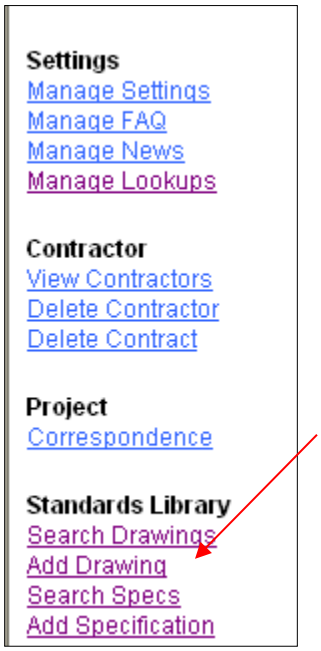


Figure 142 – Add Drawing link

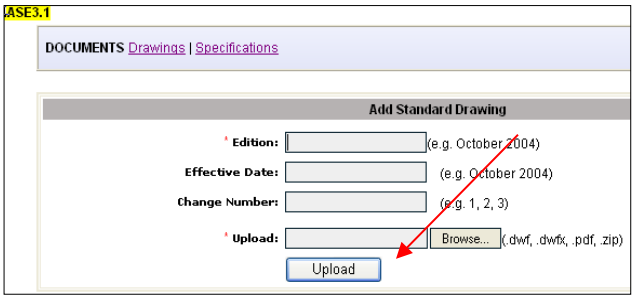


Figure 143 – Enter drawing criteria; then click upload

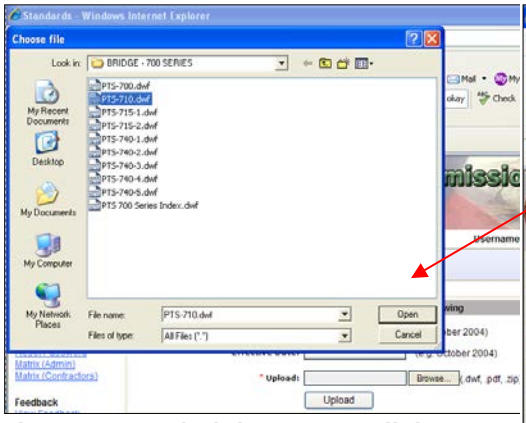


Figure 144 – Find document, click Open button

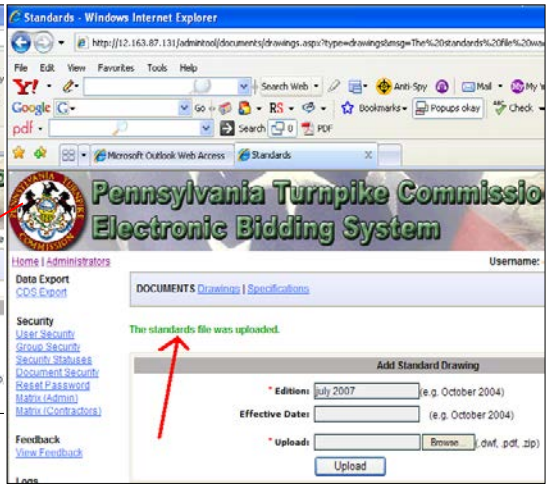


Figure 145 – Confirmation that the drawing has been uploaded

Admin Tool - Delete Commission Specification

Procedure

- Click on the Search Specs link under the Standards Library section in the navigation bar (Figure 138 below)

- Enter one or more criteria including: Year, Change Number, Type (or Types), and/or Section (Figure 147)
- Click on the Search button
- Click on the check box of the specification you want deleted, or click select all to select all in the list
- Click on the Delete link in the Actions column for a specification in the list (Figure 139)
- Click on the confirmation of deletion button at the bottom of the warning page to permanently remove the specification
- Once deleted successfully, a confirmation message will appear (Figure 148)

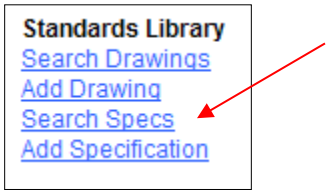


Figure 146 – Search Specs link

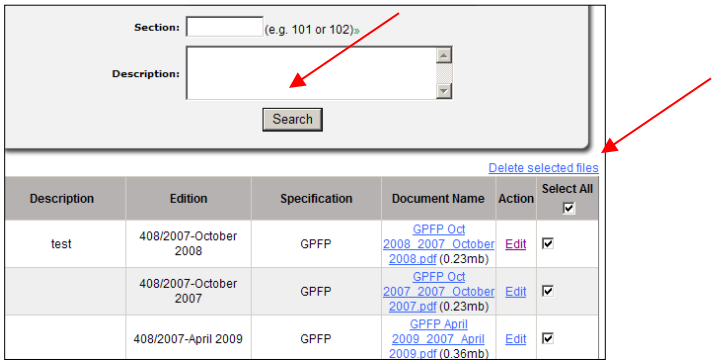


Figure 147 – Delete selected files link

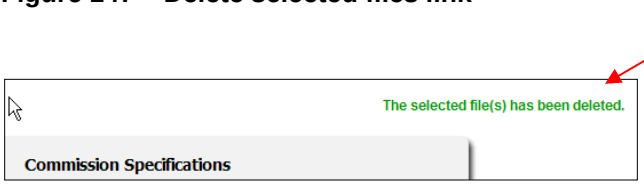


Figure 148 – Confirmation message for deletion

Admin Tool - Delete Standard Drawing

Procedure:

- Click on the Search Drawings link under the Standards Library section in the left navigation bar (Figure 149, below)
- Enter one or more search criteria including: Type (or Types), PTC Series Number, Edition and/or Sheet Number (Figure 150)
- Click on the Search button
- Click on the Delete link in the Actions column for a drawing in the list ; select one file or multiples (Figure 151)
- Once deleted successfully, a confirmation message will appear (Figure 152)

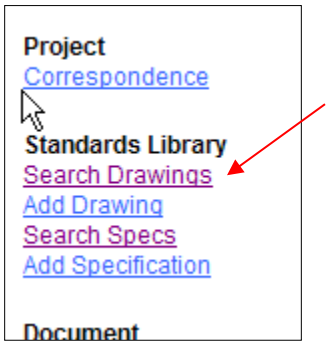


Figure 149 – Search drawings link

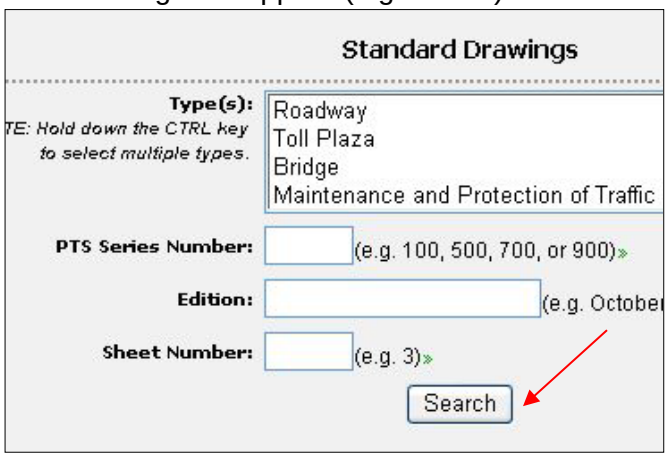


Figure 150 – Search button

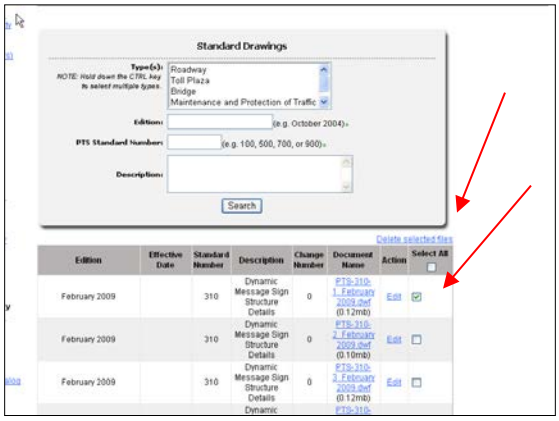


Figure 151 – Search results screen – select files for deletion

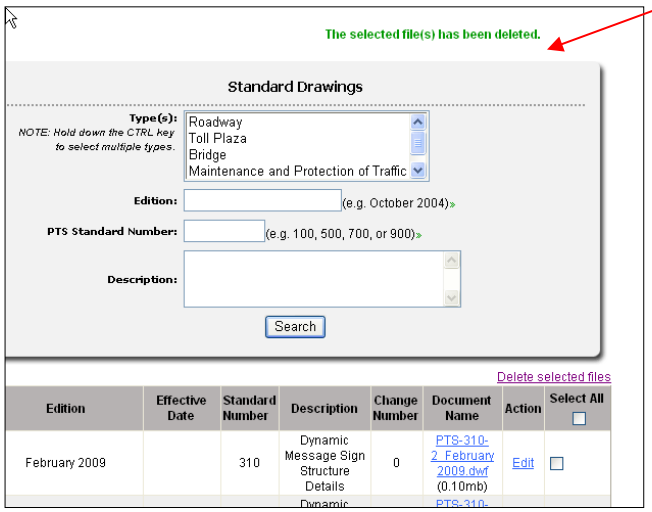


Figure 152 – Confirmation message

Admin Tool - Edit Commission Specification

Procedure:

- Click on the Search Specs link under the Standards Library section in the navigation bar (Figure 153, below)
- Enter one or more criteria including: Year, Change Number, Type (or Types), and/or Section (Figure 154)
- Click on the Search button
- Click on the Edit link in the Actions column for a specification in the list
- Update one or more data fields for the specification, the click Update button (Figure 155)
- Click on the Update button at the bottom of the page to update the specification data and/or file
- Confirmation message that the specification was updated (Figure 156)

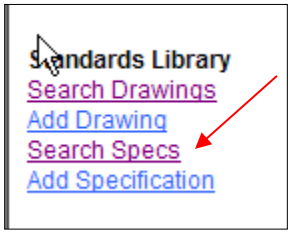


Figure 153 – Seach specs link

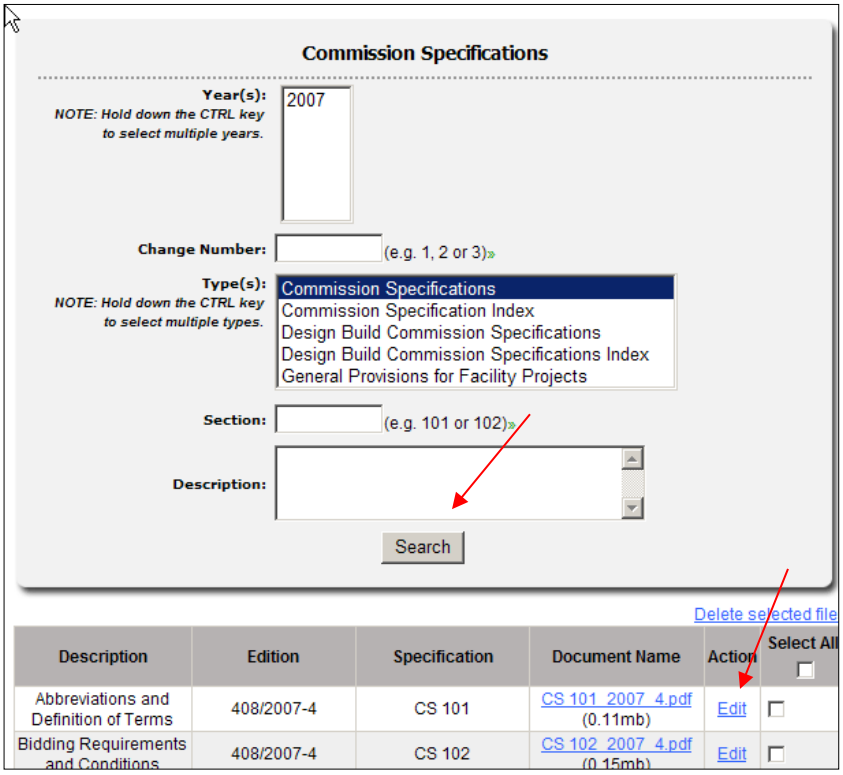


Figure 154 – Search for spec to edit, Edit link

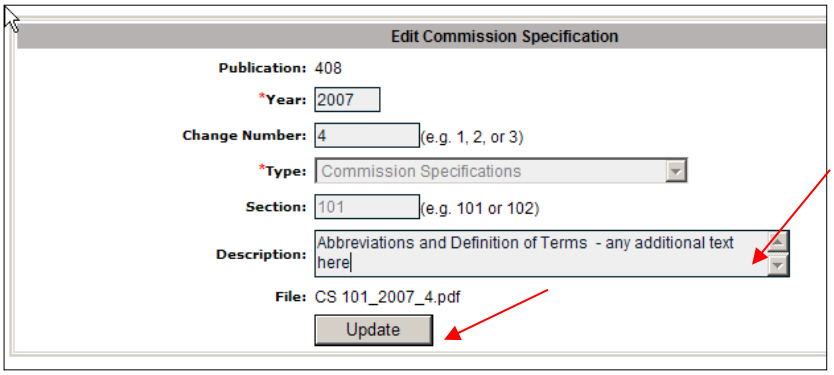

Edit Commission Specification
Publication: 408
*Year: 2007
Change Number: 4 (e.g. 1, 2, or 3)
*Type: Commission Specifications
Section: 101 (e.g. 101 or 102)
Description: Abbreviations and Definition of Terms - any additional text here
File: CS 101_2007_4.pdf
Update

Figure 155 – Specification criteria to edit; click Update button to complete

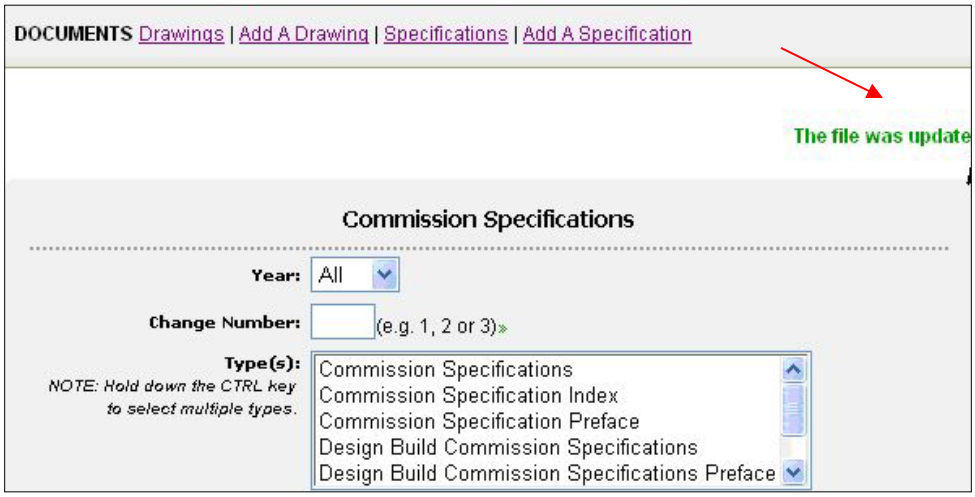

DOCUMENTS Drawings | Add A Drawing | Specifications | Add A Specification
The file was update
Commission Specifications
Year: All
Change Number: (e.g. 1, 2 or 3)»
Type(s):
NOTE: Hold down the CTRL key to select multiple types.
Commission Specifications
Commission Specification Index
Commission Specification Preface
Design Build Commission Specifications
Design Build Commission Specifications Preface

Figure 156 – Confirmation message; specification was updated

Admin Tool - Edit Commission Standard Drawing

Procedure:

- Click on the Search Drawings link under the Standards Library section in the navigation bar (Figure 157, below)
- Enter one or more criteria including: Type (or Types), PTC Series Number, Edition and/or Sheet Number (Figure 158)
- Click on the Search button
- Click on the Edit link in the Actions column for a drawing in the list (Figure 159)
- Update one or more data fields for the drawing (Figure 160)
- Click on the Update button at the bottom of the page to update the drawing data and/or file
- Upon successful update, a confirmation message will appear (Figure 161)

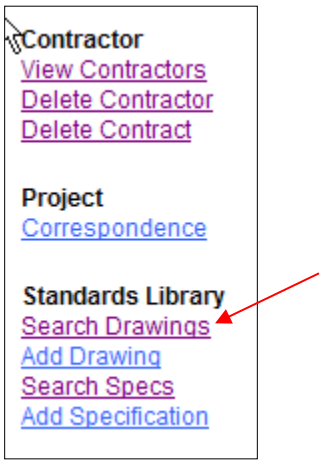


Figure 157 – Search Drawings link

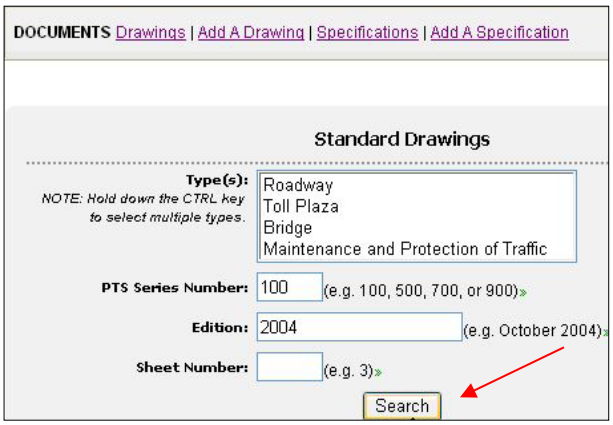

DOCUMENTS Drawings | Add A Drawing | Specifications | Add A Specification
Standard Drawings
Type(s):
NOTE: Hold down the CTRL key to select multiple types.
Roadway
Toll Plaza
Bridge
Maintenance and Protection of Traffic
PTS Series Number: 100 (e.g. 100, 500, 700, or 900)
Edition: 2004 (e.g. October 2004)
Sheet Number: (e.g. 3)
Search

Figure 158 – Search drawing crietria screen; Search button

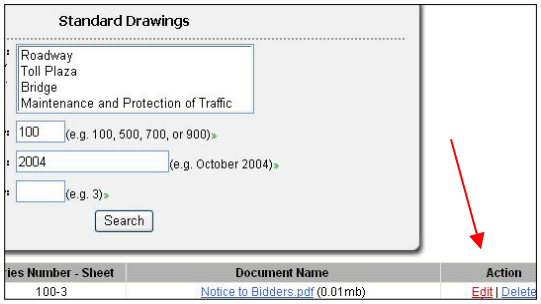


Figure 159 – Edit link

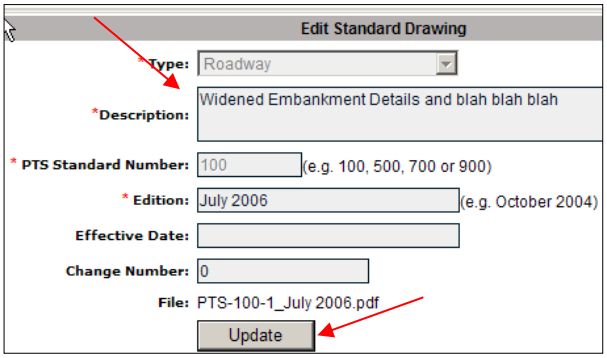

Edit Standard Drawing
Type: Roadway
Description: Widened Embankment Details and blah blah blah
PTS Standard Number: 100 (e.g. 100, 500, 700 or 900)
Edition: July 2006 (e.g. October 2004)
Effective Date:
Change Number: 0
File: PTS-100-1_July 2006.pdf
Update

Figure 160 – Edit one or more criteria, Update button

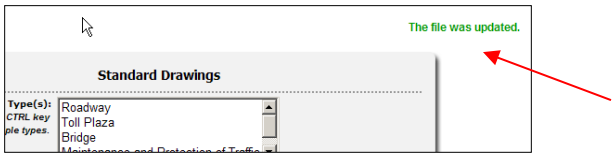


Figure 161 – Confirmation of update

Admin Tool – Add New Standard Drawing Description

These Commission Standard Drawing Descriptions generally do not change very often, and by adding the lookup table that allows the PTC Contract Admin to add a new number and description for a Standard Drawing in a series, the upload of new Standard Drawing zip files with file naming conventions as shown below allows files to be uploaded in bulk by stripping out the PTS Standard Series Number, Change Number, Edition, and then matching to the description already contained in this lookup table.

NOTE: Effective date is added by default when the Standard drawings are added

Procedure:

- Click on the Manage Lookups link under the Settings section in the navigation bar (Figure 162, below)
- Select a table name from the drop-down list : **standard_drawing_desc**
- Click on the Display Values button
- Add a new Standards Number - three digits - for the new drawing (Figure 163)
- Add the new description
- Click the Active box if appropriate
- Then Click Add Section button (Figure 163)
- Existing drawing descriptions may be edited in this table by clicking the Edit link under the Modify column on the right

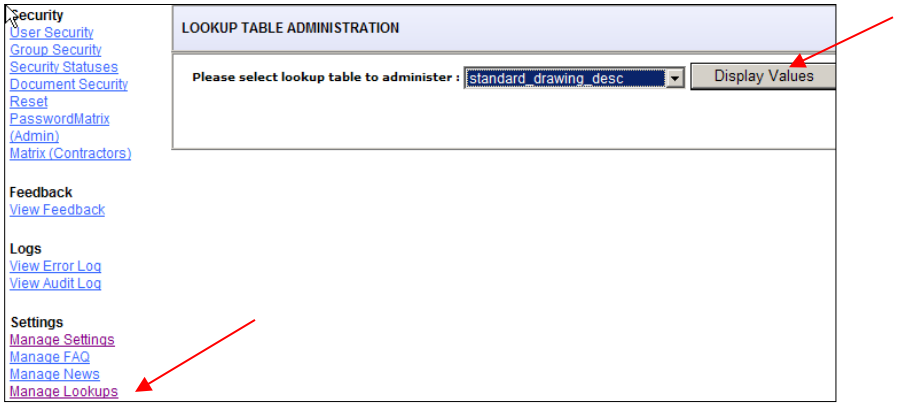


Figure 162 – Manage Lookups link; select lookup table; display values

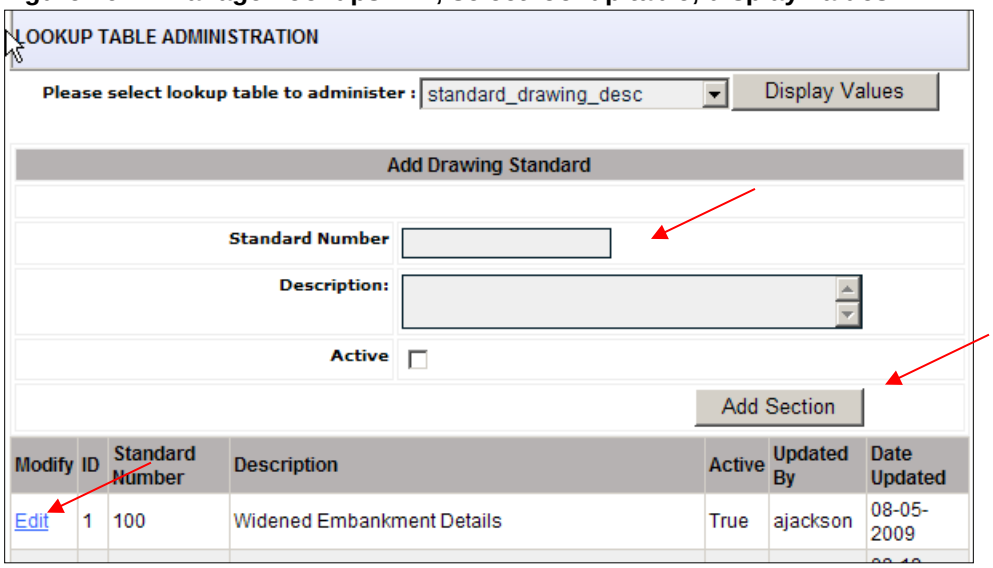


Figure 163 – Add Drawing Standard screen; Edit link

Admin Tool – Add New Standard Specification Description

These Standard Specification Descriptions generally do not change much, and by adding the lookup table that allows the PTC Contract Admin to add a new number and description for a Standard Specification in a series, the upload of new Standard Specification zip files with file naming conventions as shown below allows files to be

uploaded in bulk by stripping out the PTS Standard Commission data. CS Specification Series Number, Year, Change Number (no number indicates Base Year), 1,2 or 3, and then matching to the description already contained in this lookup table.

To add a new Standard Specification description:
Procedure:

- Click on the Manage Lookups link under the Settings section in the navigation bar (Figure 164, below)
- Select a table name from the drop-down list : **standard_specification_desc**
- Click on the Display Values button Add a new Section Number (three digits) for the new drawing
- Add the new description
- Click the Active box if appropriate
- Then Click Add Section button
- You may also edit existing specification descriptions in this table by clicking the Edit link

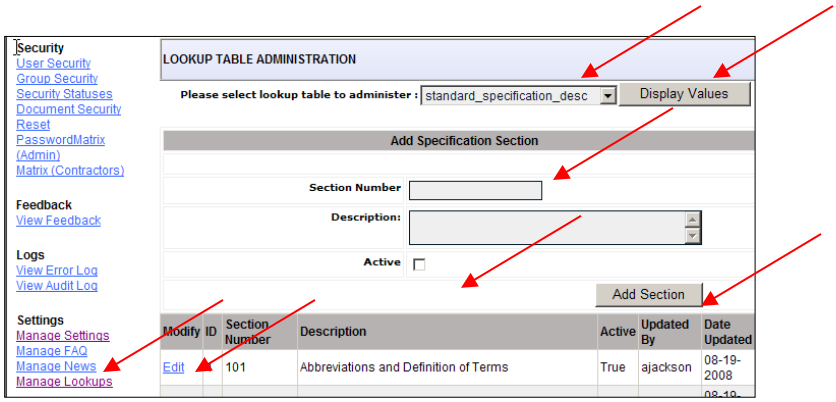


Figure 164 – Lookup table administration screen

Admin Tool – Add Specification Year

PTC Contract Admins will have the ability to add to or edit years in the Lookup Table. Every time a new Specification Series comes out, the year can be added here.

Procedure:

- Click on the Manage Lookups Link under the Settings section in the left Navigation bar (Figure 165)
- Click on the Drop Down window under Lookup Table Administration and select **Specification _Year** and then click on display values (Figure 166)
- Either click on Edit to change a description , then Update or click on Add to create a new item to the Lookup Table

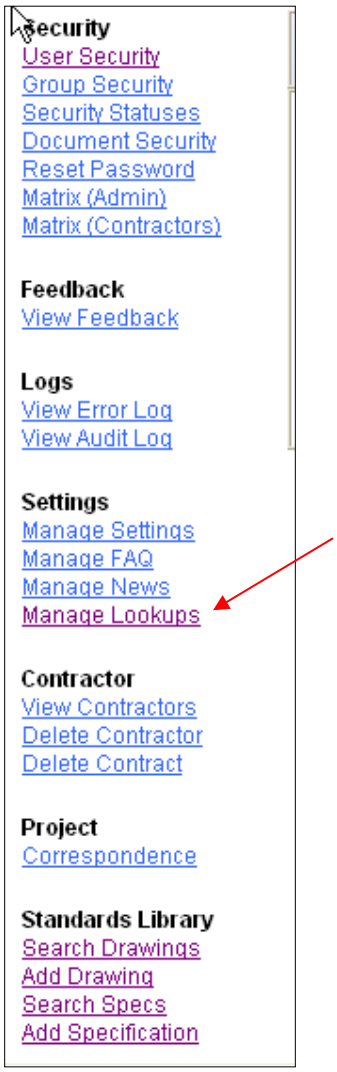


Figure 165 – Manage Lookups link

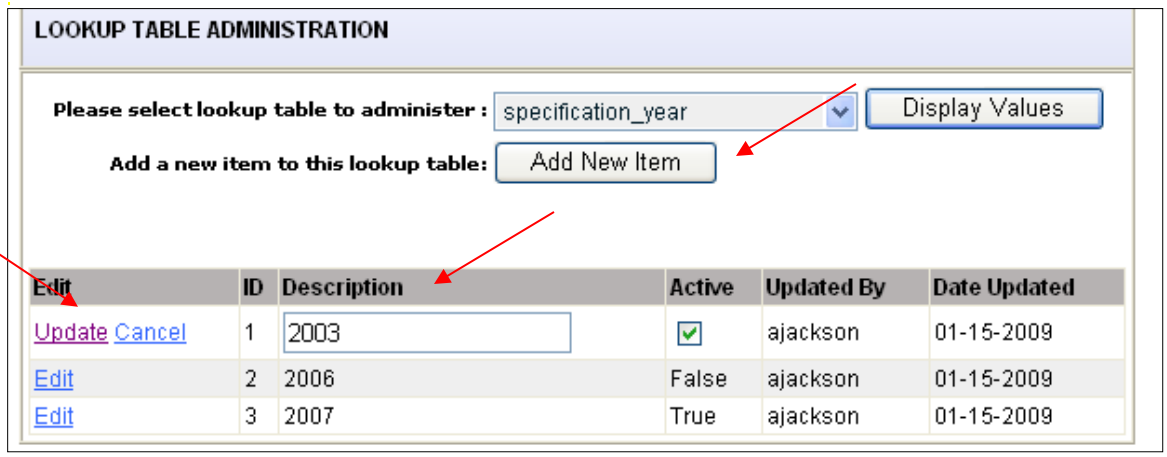


Figure 166 – Lookup table, Add New Item button, Edit and Update existing specification options

Chapter 9 Bid Document Management

This feature was added to allow PTC Contract Managers to edit existing and upload new bid documents online directly to the EBS Production Server, instead of requesting IT support staff to load them. It assumes that the Document Type has been already loaded in the Document_Type lookup table. However if a new Bid Document Type is needed; it must be added to the Document_Type lookup table first.

To edit an existing Bid Document
Procedure:

- Click on the Document Management link under the Document management section in the left navigation bar (Figure 167, below)
- Select an existing document from drop down list and click on view document info field box (Figure 168)
- In the view document section click on the document name link to view (Figure 169)
- A file download box pops up; then click open or save (Figure 170
- Edit desired information to document and save
- Browse to revised document then upload at Modify Document portion of the screen (Figure 169)
- Figure 171 – example of document

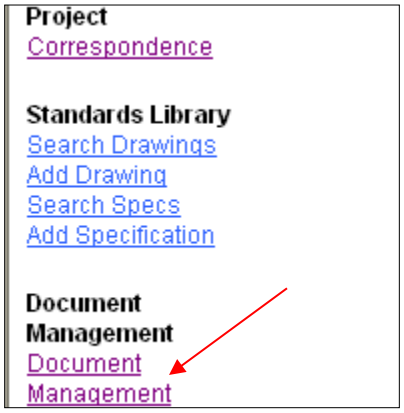


Figure 167 – Document Management link

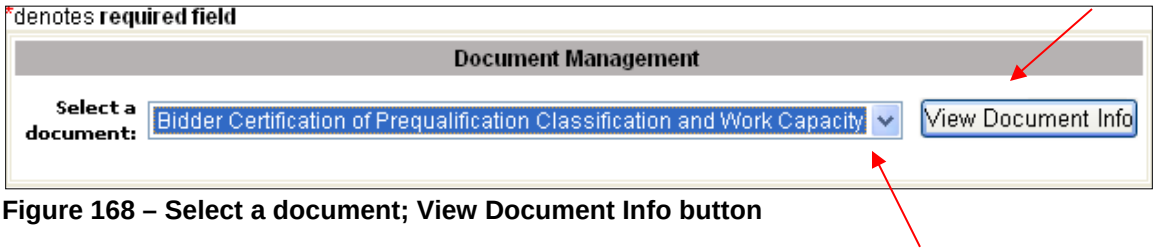


Figure 168 – Select a document; View Document Info button

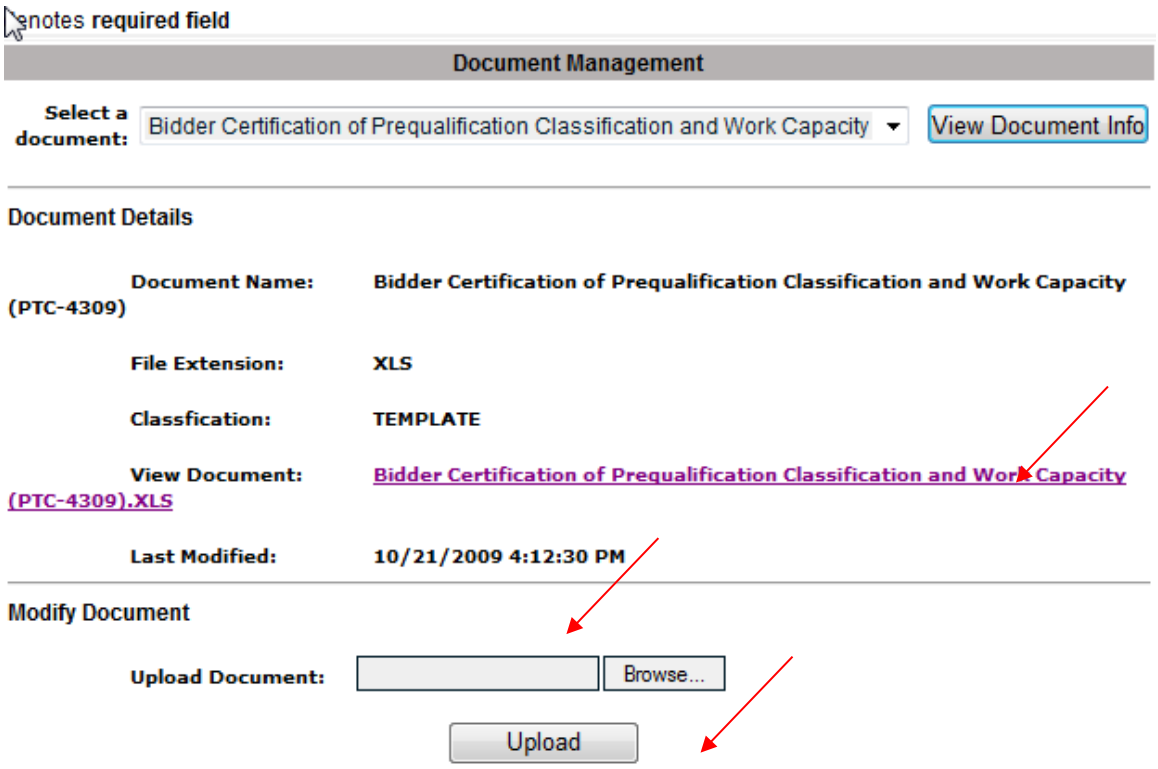


Figure 169 – Document Details, View Document link

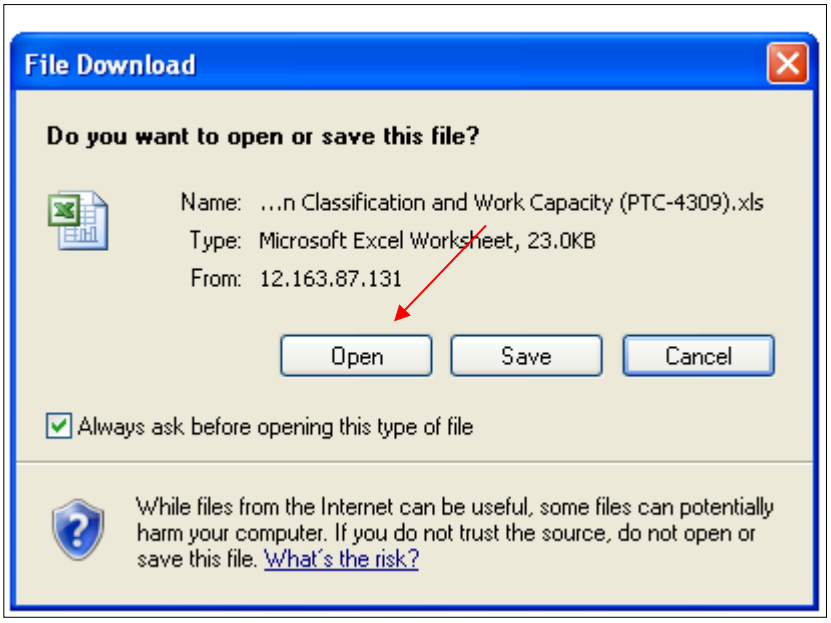

File Download
Do you want to open or save this file?
Name: ...n Classification and Work Capacity (PTC-4309).xls
Type: Microsoft Excel Worksheet, 23.0KB
From: 12.163.87.131
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Figure 170 – Open or Display document pop-up

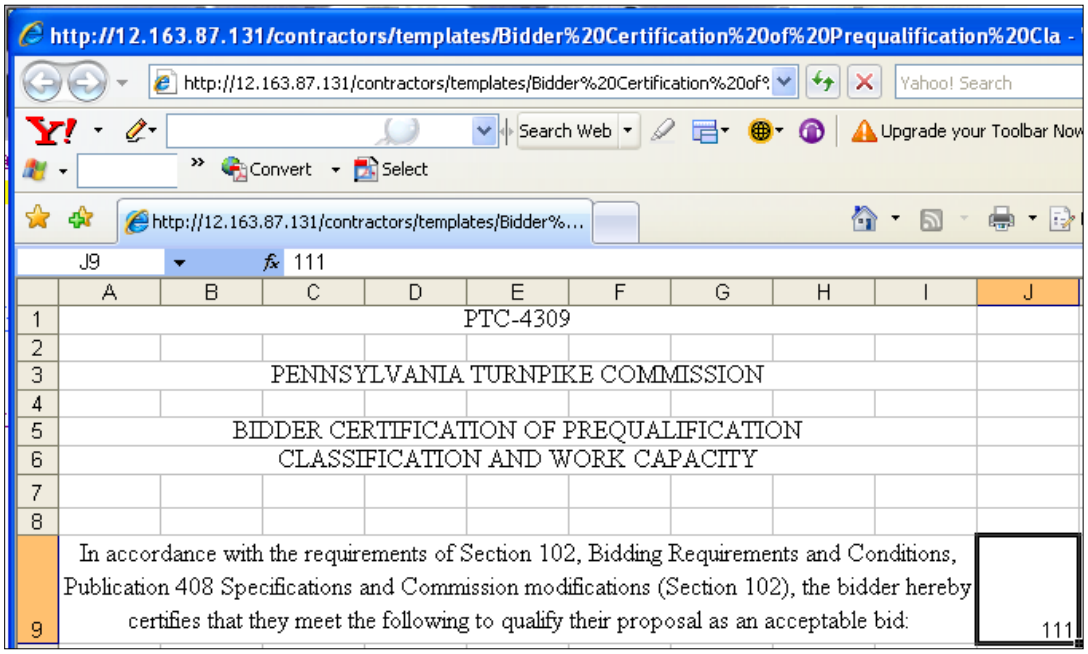

http://12.163.87.131/contractors/templates/Bidder%20Certification%20of%20Prequalification%20Cla
http://12.163.87.131/contractors/templates/Bidder%20Certification%20of%
Yahoo! Search
Search Web
Upgrade your Toolbar Now
Convert
Select
http://12.163.87.131/contractors/templates/Bidder%...
J9
111
PTC-4309
PENNSYLVANIA TURNPIKE COMMISSION
BIDDER CERTIFICATION OF PREQUALIFICATION
CLASSIFICATION AND WORK CAPACITY
In accordance with the requirements of Section 102, Bidding Requirements and Conditions, Publication 408 Specifications and Commission modifications (Section 102), the bidder hereby certifies that they meet the following to qualify their proposal as an acceptable bid:
111

Figure 171 - Example of viewing bid document

To add an entirely new Bid Document to the current list

(**NOTE:** Add to the Document_Types lookup table first and classify it as a template or it will not show up in the Document management list)

Procedure:

- Click on the Manage Lookups Link under the Settings section in the left Navigation bar (Figure 172, below)
- Select the lookup table document_types to administer from drop down list and click on the Display values field box
- Here you can add a new item to the lookup table or edit an existing one (Figures 173, 174)

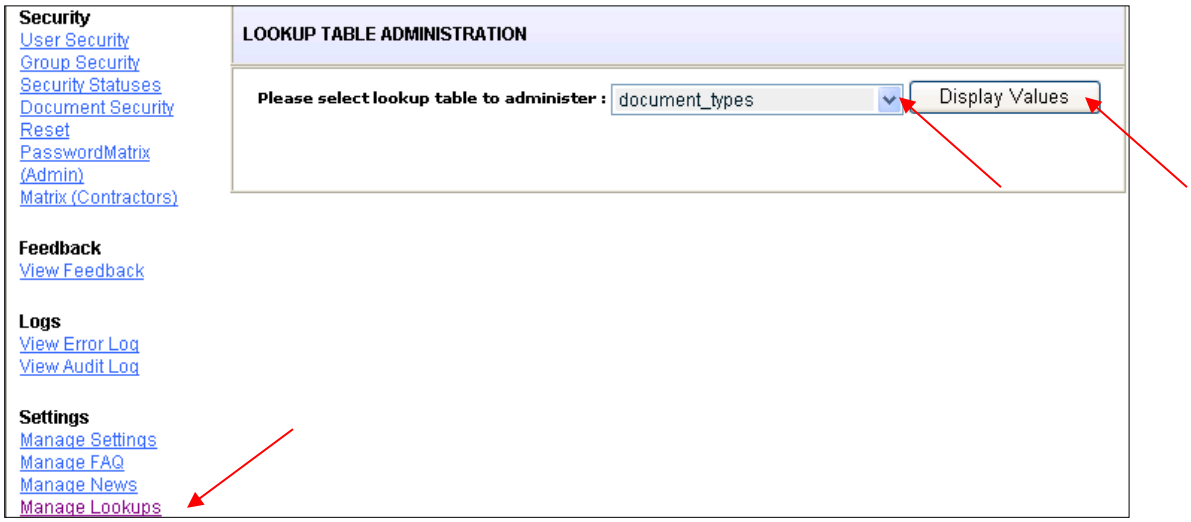


Figure 172 - Manage lookups, select lookup table, Display Value button

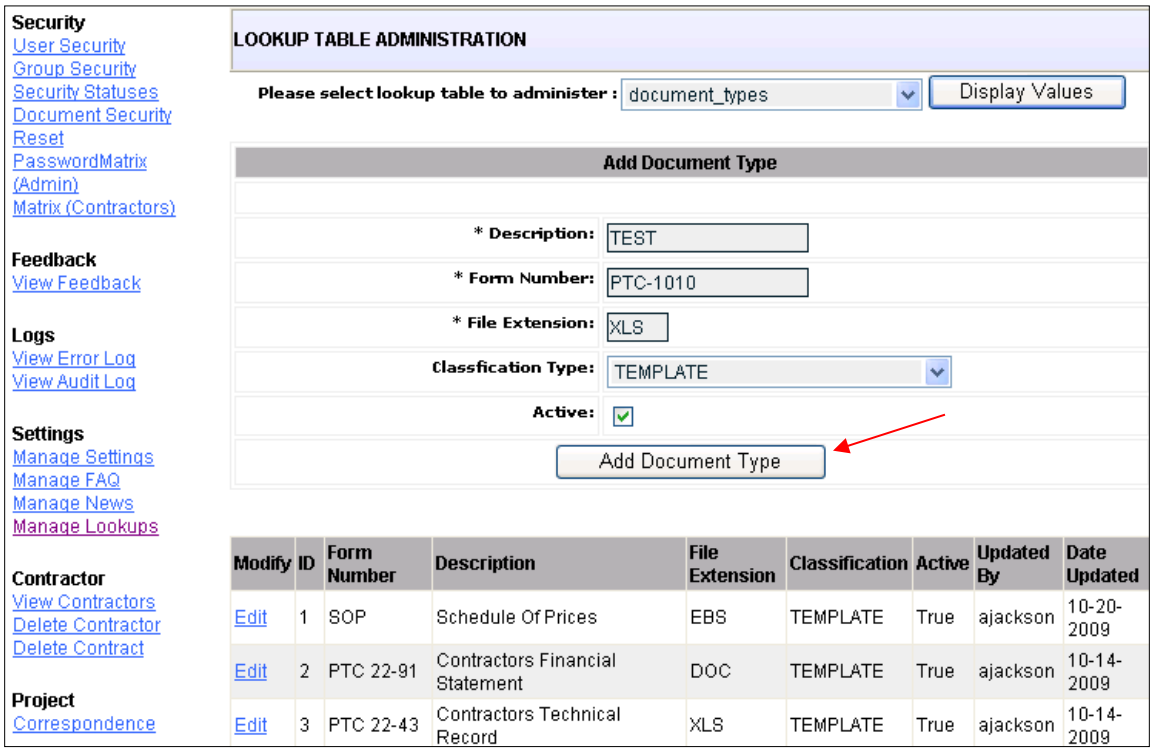


Figure 173 - Add Document Type

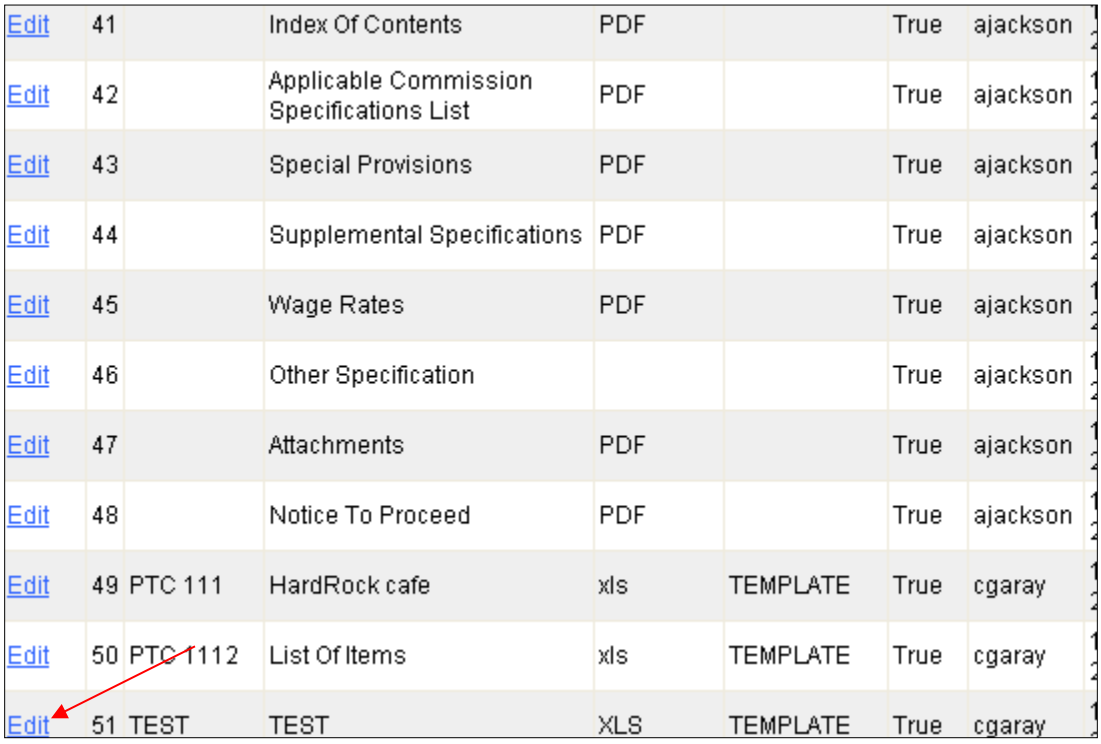

Edit 41 Index Of Contents PDF True ajackson
Edit 42 Applicable Commission Specifications List PDF True ajackson
Edit 43 Special Provisions PDF True ajackson
Edit 44 Supplemental Specifications PDF True ajackson
Edit 45 Wage Rates PDF True ajackson
Edit 46 Other Specification True ajackson
Edit 47 Attachments PDF True ajackson
Edit 48 Notice To Proceed PDF True ajackson
Edit 49 PTC 111 HardRock cafe xls TEMPLATE True cgaray
Edit 50 PTC 1112 List Of Items xls TEMPLATE True cgaray
Edit 51 TEST TEST XLS TEMPLATE True cgaray

Figure 174 – Edit Document Type

Chapter 10 Item Price Catalog

Admin Tool - Manage Item Catalog

Procedure:

- Click on the Manage Item Catalog link under the Items section in the navigation bar (Figure 175, below)
- Click on the Add New Item link at the top of the page (Figure 176)
- Enter values for the new item including item number (e.g. 2601-9584), item type – always Turnpike, unit of measure, and description (Figure 177)
- Units of measure options (Figure 178)
- Click on the Add New Item link (Figure 177)
- Confirmation message – new item added successfully (Figure 179)

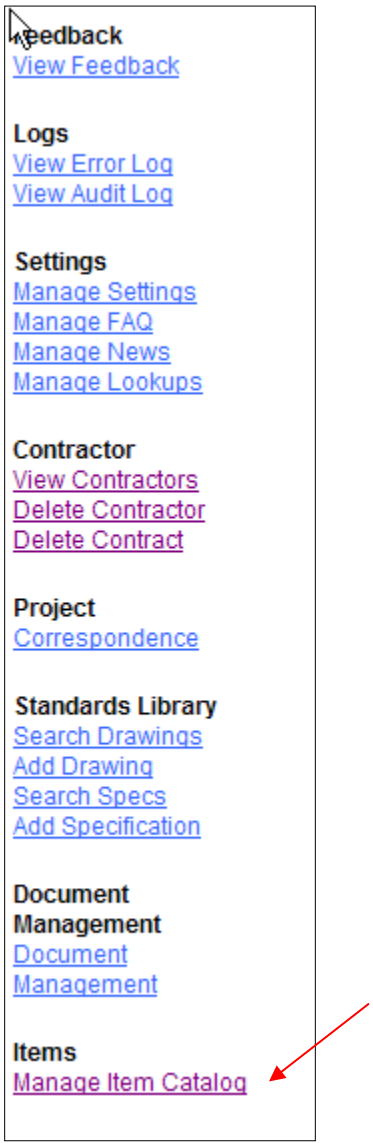


Figure 175 – Manage Item Catalog link

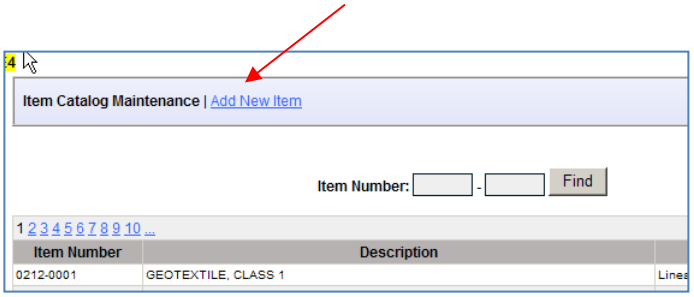


Figure 176 – Add New (catalog) Item link

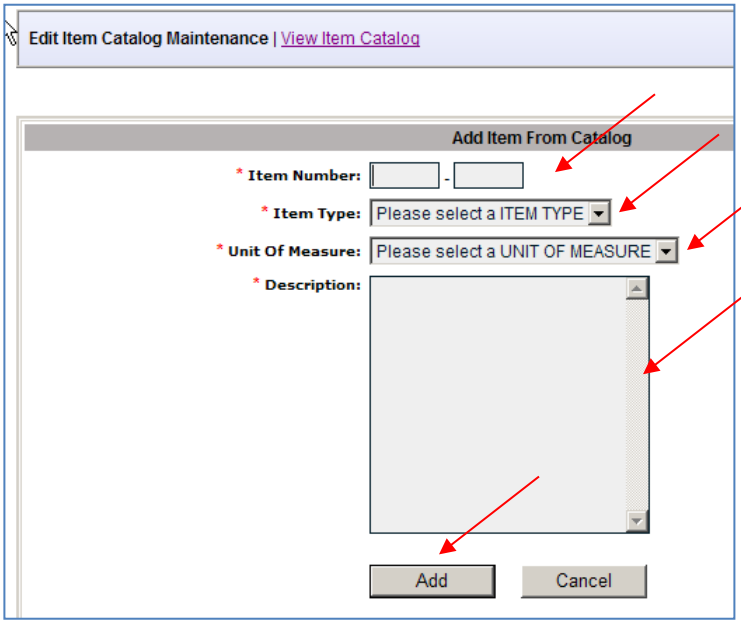


Figure 177 – Enter Item information, Add button

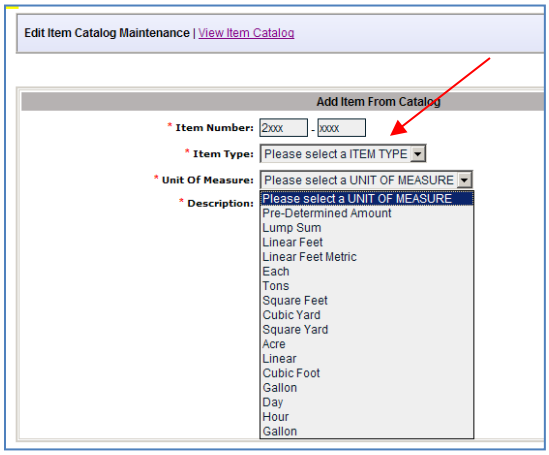


Figure 178 – Unit of Measure options

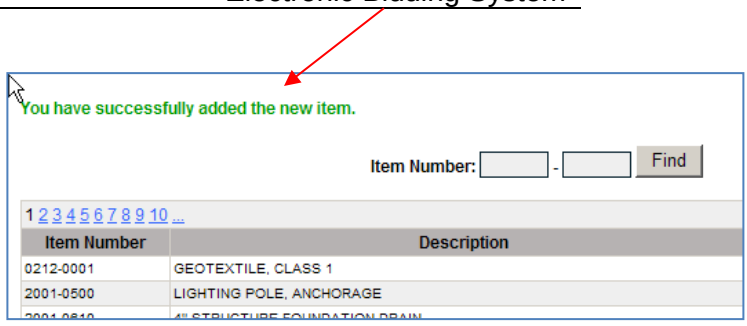


Figure 179 – Confirmation message that item was added

Admin Tool - Edit Master Item

Procedure:

- Click on the Manage Item Catalog link under the Items section in the navigation bar (Figure 180, below)
- Click on the Edit link for an item in the table (Figure 181)
- Update existing values for the master item (Figure 182)
- Click on the Update button

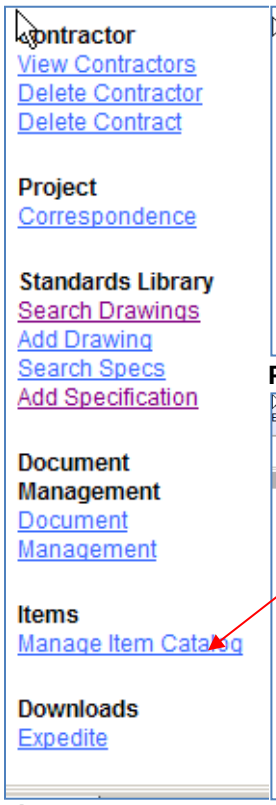


Figure 180 – Manage Item Catalog link

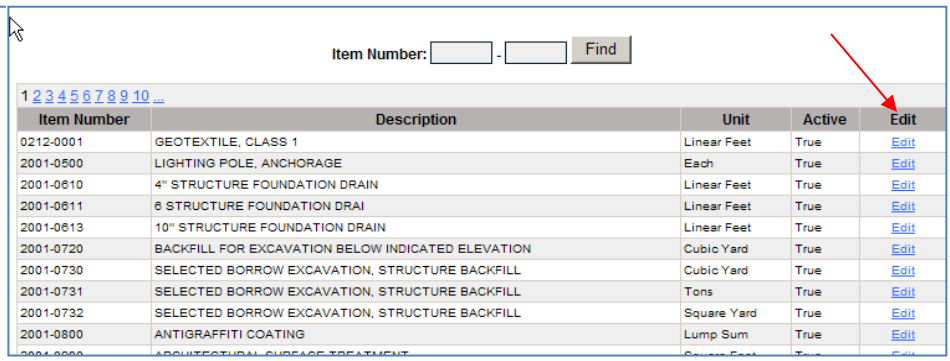

Item Number: - Find
1 2 3 4 5 6 7 8 9 10 ...
Item Number
Description
Unit
Active
Edit
0212-0001 GEOTEXTILE, CLASS 1 Linear Feet True Edit
2001-0500 LIGHTING POLE, ANCHORAGE Each True Edit
2001-0610 4" STRUCTURE FOUNDATION DRAIN Linear Feet True Edit
2001-0611 6 STRUCTURE FOUNDATION DRAI Linear Feet True Edit
2001-0613 10" STRUCTURE FOUNDATION DRAIN Linear Feet True Edit
2001-0720 BACKFILL FOR EXCAVATION BELOW INDICATED ELEVATION Cubic Yard True Edit
2001-0730 SELECTED BORROW EXCAVATION, STRUCTURE BACKFILL Cubic Yard True Edit
2001-0731 SELECTED BORROW EXCAVATION, STRUCTURE BACKFILL Tons True Edit
2001-0732 SELECTED BORROW EXCAVATION, STRUCTURE BACKFILL Square Yard True Edit
2001-0800 ANTIGRAFFITI COATING Lump Sum True Edit

Figure 181 – Edit link

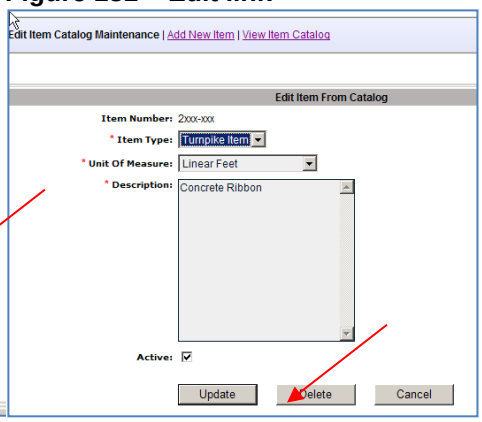


Figure 182 – Update button

Admin Tool - Delete Master Item

Procedure:

- Click on the Manage Item Catalog link under the Items section in the navigation bar (Figure 183)
- Click on the Edit link for an item in the table (Figure 184)
- Click on the Delete button (Figure 185)
- Confirmation of deletion message (Figure 186)

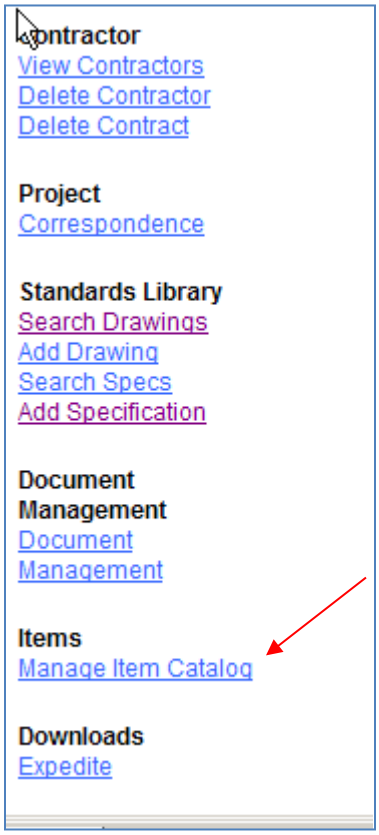


Figure 183 – Manage Item Catalog link

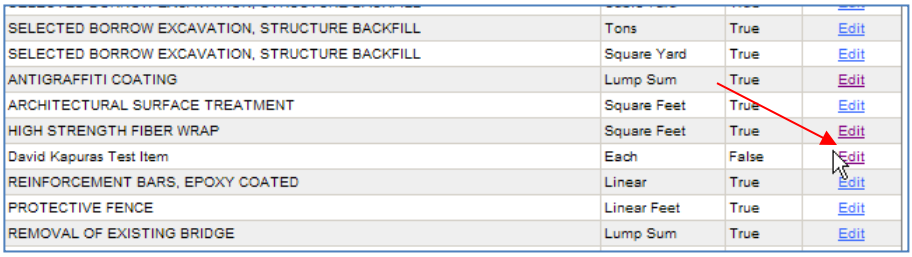

SELECTED BORROW EXCAVATION, STRUCTURE BACKFILL | Tons | True | Edit
SELECTED BORROW EXCAVATION, STRUCTURE BACKFILL | Square Yard | True | Edit
ANTIGRAFFITI COATING | Lump Sum | True | Edit
ARCHITECTURAL SURFACE TREATMENT | Square Feet | True | Edit
HIGH STRENGTH FIBER WRAP | Square Feet | True | Edit
David Kapuras Test Item | Each | False | Edit
REINFORCEMENT BARS, EPOXY COATED | Linear | True | Edit
PROTECTIVE FENCE | Linear Feet | True | Edit
REMOVAL OF EXISTING BRIDGE | Lump Sum | True | Edit

Figure 184 – Edit link

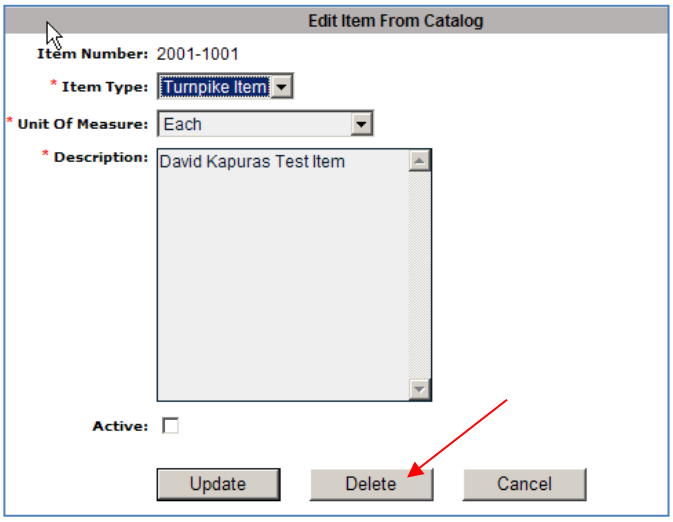


Figure 185 – Delete button

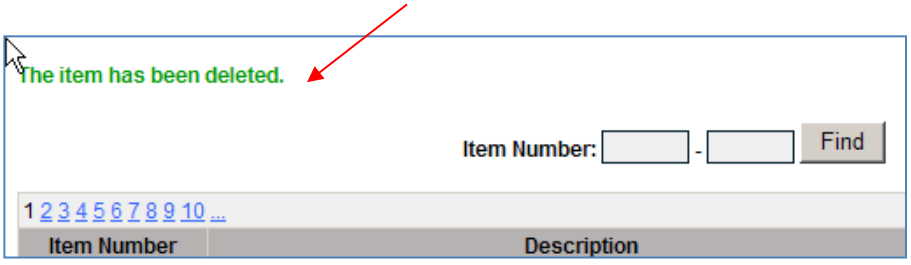


Figure 186 – Delete confirmation message

Chapter 11 Downloads

Download Expedite Bid Software

Procedure:

- Click on the Expedite link under the Downloads section in the left navigation bar (Figure 187, below)
- Click on the Download Expedite button at the bottom of the page (Figure 188)
- Click on the Save button (Figure 189)
- Click on the Save button to save the software setup application to your computer (Figure 190)
- If you are prompted to save over an existing file, click on the Yes button (Figure 191)
- Click on the Close button in the pop-up window (Figure 192)
- Open Windows Explorer and browse to the folder where you saved the file "setup.exe" (Figure 193)
- Double-click on the file "setup.exe"
- Click on the Run button to begin the installation,
- Click on Next button to continue (Figure 194)
- Click on the Yes button to accept terms of the software (Figure 195)
- Click on the Next button (Figure 196)
- Click on the Browse button and enter the folder name then click on the Ok button (Figure 197) NOTE: remember this folder name
- Click on the Finish button (Figure 198)

To configure Expedite for PTC Bids:

Procedure:

- Double Click the Expedite Icon on your desktop (Figure 199)
- Click on the Ok button in the Expedite pop-up window (Figure 200)
- Click on the Tools menu in the menubar and select the Options menu item (Figure 201)
- Agency ID tab: Click on the Agency/ID tab in the pop-up window (Figure 202)
- Click on the first empty cell under the Agency column and type PATURNPIKE, then OK button
- Bidder Information Tab: Click on the cell to the immediate right and type the PTC bidder id **, then click the OK button** (Figure 156)
- Close the Expedite bid application

Figure 187 – Expedite link

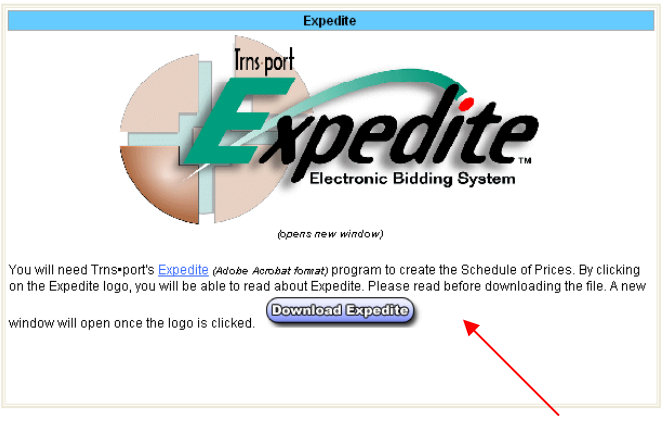

Expedite
Trns port
Expedite
Electronic Bidding System
(opens new window)
You will need Trns•port's Expedite (Adobe Acrobat format) program to create the Schedule of Prices. By clicking on the Expedite logo, you will be able to read about Expedite. Please read before downloading the file. A new window will open once the logo is clicked.
Download Expedite

Figure 188 – Expedite splash screen; Download Expedite button

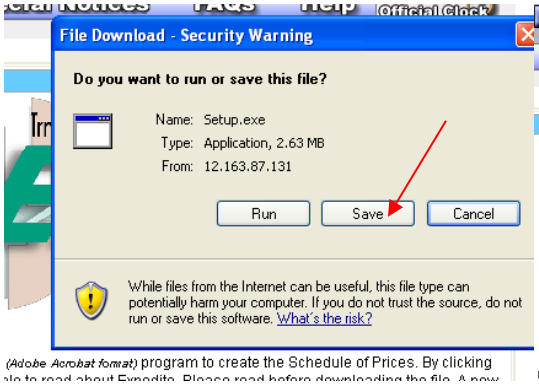

File Download - Security Warning
Do you want to run or save this file?
Name: Setup.exe
Type: Application, 2.63 MB
From: 12.163.87.131
Run
Save
Cancel
While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not run or save this software. What's the risk?
(Adobe Acrobat format) program to create the Schedule of Prices. By clicking

Figure 189 – Run button to install on the fly

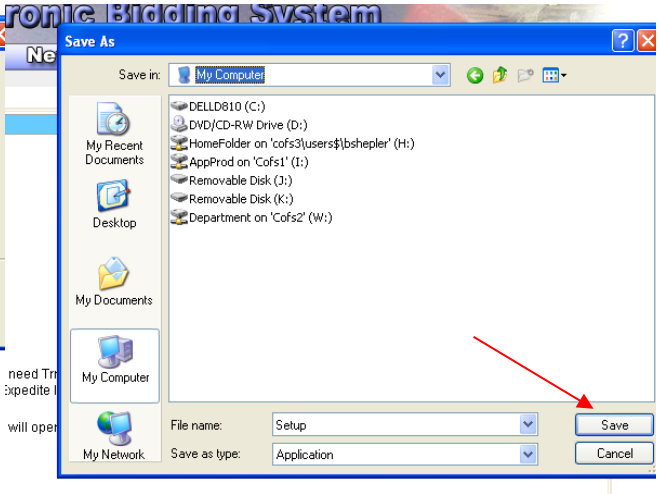


Figure 190 – Save setup file to disk to run later

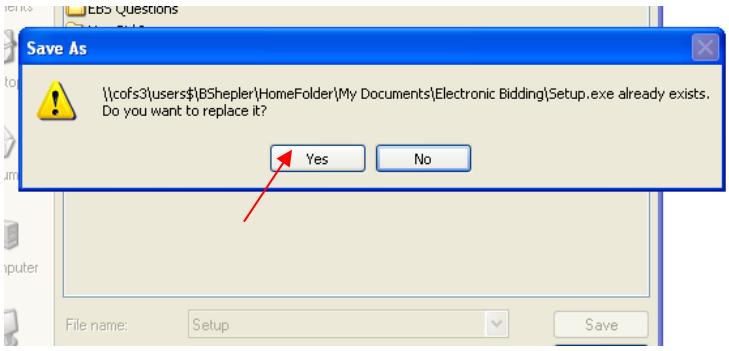


Figure 191 – Replace setup file when updating to a new version

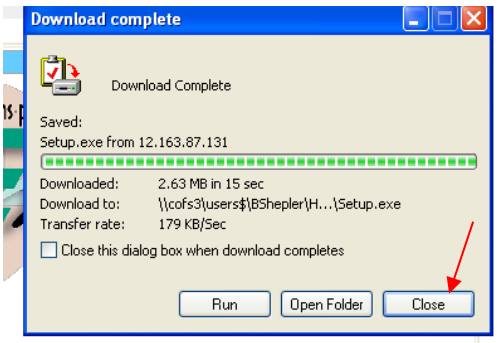


Figure 192 – Close dialog box when finished downloading

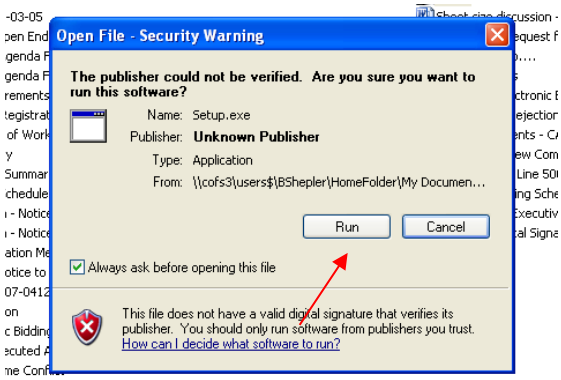

Open File - Security Warning
The publisher could not be verified. Are you sure you want to run this software?
Name: Setup.exe
Publisher: Unknown Publisher
Type: Application
From: \\cofs3\users$\BShepler\HomeFolder\My Documen...
Run
Cancel
Always ask before opening this file
This file does not have a valid digital signature that verifies its publisher. You should only run software from publishers you trust.
How can I decide what software to run?

Figure 193 – Run the setup file to install Expedite

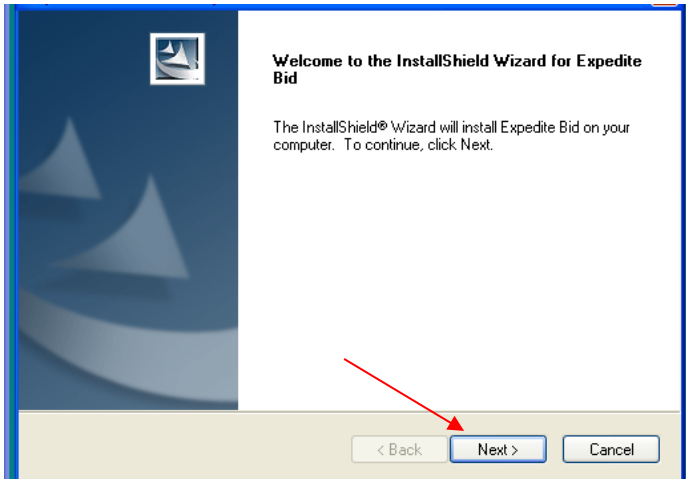

Welcome to the InstallShield Wizard for Expedite Bid
The InstallShield® Wizard will install Expedite Bid on your computer. To continue, click Next.
< Back
Next >
Cancel

Figure 194 – Expedite install screen

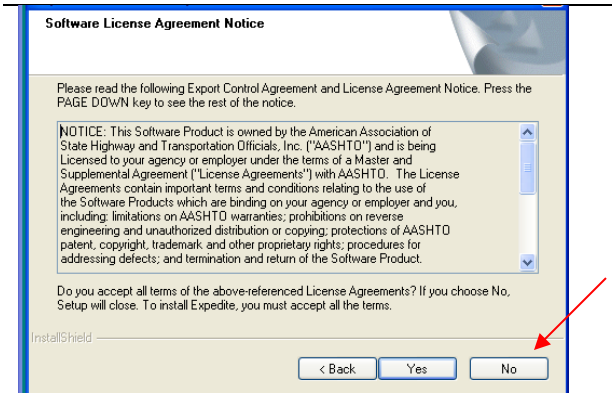

Software License Agreement Notice
Please read the following Export Control Agreement and License Agreement Notice. Press the PAGE DOWN key to see the rest of the notice.
NOTICE: This Software Product is owned by the American Association of State Highway and Transportation Officials, Inc. ("AASHTO") and is being Licensed to your agency or employer under the terms of a Master and Supplemental Agreement ("License Agreements") with AASHTO. The License Agreements contain important terms and conditions relating to the use of the Software Products which are binding on your agency or employer and you, including: limitations on AASHTO warranties; prohibitions on reverse engineering and unauthorized distribution or copying; protections of AASHTO patent, copyright, trademark and other proprietary rights; procedures for addressing defects; and termination and return of the Software Product.
Do you accept all terms of the above-referenced License Agreements? If you choose No, Setup will close. To install Expedite, you must accept all the terms.
InstallShield
< Back
Yes
No

Figure 195 – Yes, Accept terms to install

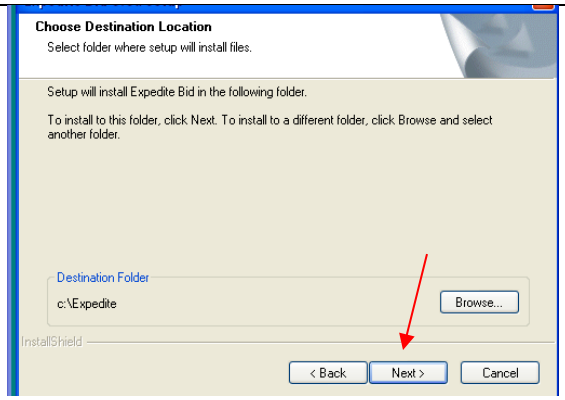

Choose Destination Location
Select folder where setup will install files.
Setup will install Expedite Bid in the following folder.
To install to this folder, click Next. To install to a different folder, click Browse and select another folder.
Destination Folder
c:\Expedite
Browse...
InstallShield
< Back
Next >
Cancel

Figure 196 – Next button to move install along

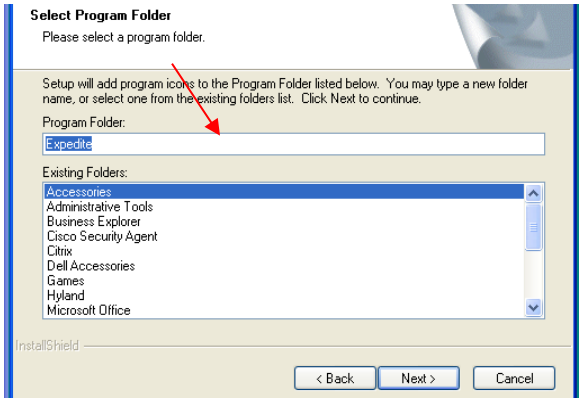


Figure 197 – Decide upon a folder to store files

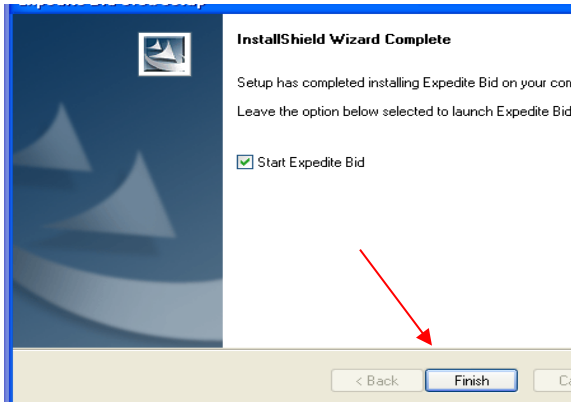

InstallShield Wizard Complete
Setup has completed installing Expedite Bid on your con
Leave the option below selected to launch Expedite Bid
Start Expedite Bid
< Back
Finish

Figure 198 – Finish button

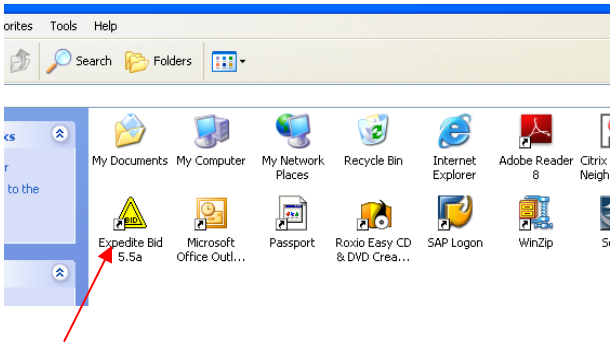


Figure 199 – Locate Expedite folder and Icon

Figure 200 – Click OK on Welcome screen

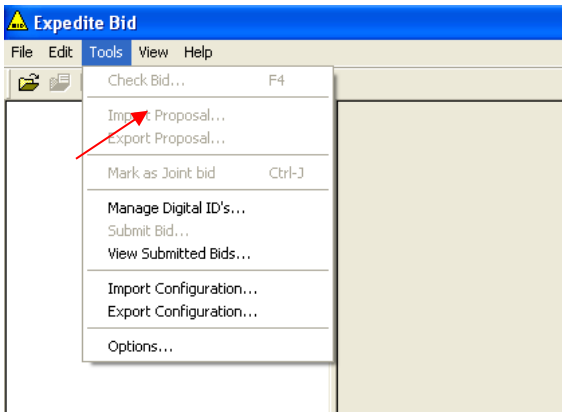


Figure 201 – Go to Tools tab, Options link

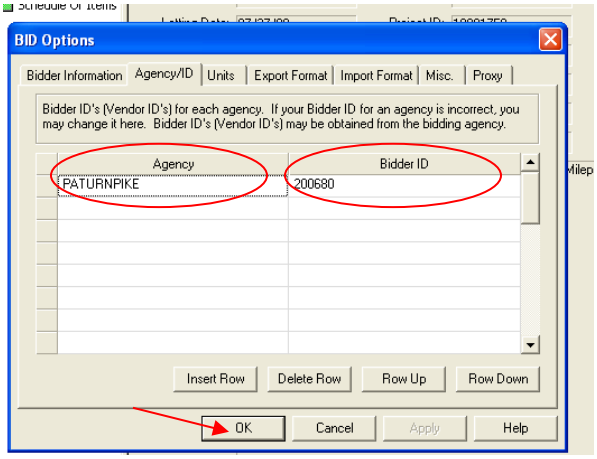


Figure 202 – Fill in PATURNPIKE and Agency ID 200680 in the AGENCYID tab

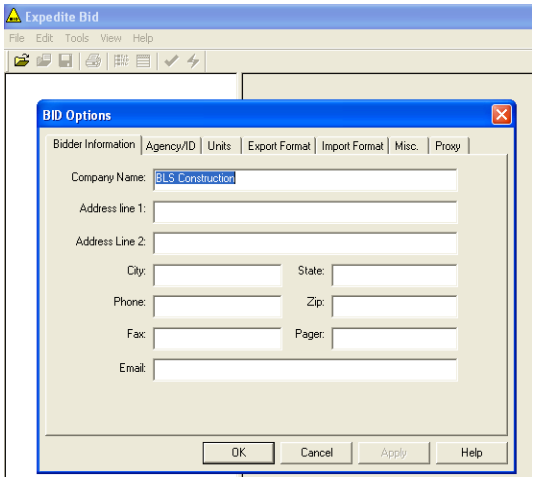


Figure 203 – Fill in Company Name in Bidder Information tab (There is a company name for PTC)